

Perplexity AI for Research — Workbook

This workbook turns the course into a working research practice inside Perplexity AI. Each section maps to one module: you will configure your workspace, run Pro Search in the right Focus, verify citations, drive follow-up threads, set up a Space with your own files, and build repeatable workflows. Work one section per module with Perplexity open in another tab, running the prompts and filling the worksheets as you go. By the end you will have a configured Space, three tested research workflows, and a verification habit that makes every finding defensible.

How Perplexity Works as a Research Tool

Set up your workspace, learn the interface, and run the same question through Perplexity, Google, and a chatbot so the differences become concrete.

Exercise: The Three-Tool Showdown

Pick one real, current-fact question you genuinely want answered this week (a recent statistic, a product detail, a news fact). Run it in Perplexity, in Google, and in a memory-only chatbot. Note how long each took to a trustworthy answer and whether you could check the source. This builds an instinct for which tool to reach for.

- Run your question in Perplexity and note: did it answer directly, and could you click through to confirm the source?

- Run the same question in Google: how many links did you open before you had the answer assembled?

- Run it in a memory-only chatbot: did it answer, refuse, or give a stale figure with no source?

- Write one sentence on which tool won for this question and why.

Worksheet: Interface Orientation Sheet

Open Perplexity and find each control below, ticking it off by writing where it lives. The biggest cause of weak results is never touching the features beyond the default search box. Keep this until the layout is second nature.

Where the Sources cards appear on an answer

What an inline citation looks like and what happens when you click it

Where the Focus selector is and which modes it offers

Where the model picker / Quick-vs-Pro toggle is (Pro plan)

Where the file/image upload control is

Where Library and Spaces live in the sidebar

My current plan (Free / Pro) and my Pro Search allowance if free

Checklist: Workspace Setup Checklist

- Created a Perplexity account and confirmed which plan I am on
- Clicked through every Focus mode once so I know they exist
- Located the model picker and noted which models are available (Pro)
- Opened settings and set preferred answer length/tone if offered
- Found the Library so I know where past threads are saved
- Ran one Quick search and one Pro Search to feel the difference

Pro Search, Focus Modes, and Better Questions

Practice choosing the right gear and Focus, and rewrite vague queries into research-grade questions that get cited, structured answers.

Exercise: Same Question, Different Focus

Pick one question where source type matters — a health, evidence, or product-opinion question. Run it in Web focus, then re-run the exact same question in a more fitting Focus (Academic for evidence, Social for user opinion, Finance for market data). Compare the sources each surfaced. The goal is to feel how much the Focus changes the raw material.

- Run your question in Web focus and list the kinds of sources it cited (news, blog, vendor, forum).

- Re-run the identical question in Academic, Social, or Finance focus as fits the topic.

- Compare: which Focus gave sources you would actually be comfortable citing, and why?

- Decide which Focus is the right default for this type of question going forward.

Worksheet: Question Sharpening Worksheet

Take one vague question you would normally type and rebuild it using the five dials from the course. Then run the sharp version in Perplexity. Keep both so you can see the quality jump for yourself.

My vague first-draft question

Scope — the narrowed subject

Specificity — the exact thing I want (number / comparison / list / timeline)

Constraints — year, region, price range, or source type

Format — table, bullets, timeline, short brief

Evidence ask — cite studies / include figures / note disagreement

My rewritten research-grade question

Which Focus and gear (Quick/Pro) I will run it in

Exercise: Quick vs. Pro, Head to Head

Choose a multi-part question (a comparison or a how-something-works). Run it once as a Quick search and once as a Pro Search. Notice the depth, the number of sources, and whether Pro asked you a clarifying question. This calibrates when the extra seconds are worth spending.

- Run the question as a Quick search and note how many sources it cited and how deep the answer went.
- Run the same question as a Pro Search; if it asks a clarifying question, answer it well.
- Compare the two answers: what did Pro Search add that Quick missed?
- Write your rule of thumb for when you will spend a Pro Search versus stay on Quick.

Checklist: Better-Question Checklist

- I narrowed the scope instead of asking about a broad topic
- I named the exact output I want (number, comparison, list, timeline)
- I added at least one constraint (year, region, source type)
- I requested a format (table, bullets, brief)
- I asked for evidence — citations, figures, or where sources disagree
- I chose a Focus deliberately rather than leaving it on default Web

Sources, Citations, and Following the Thread

Verify citations like a researcher, mine a topic through a real follow-up thread, and use Perplexity to fact-check a claim down to its primary source.

Exercise: The Thirty-Second Verification

Take any Perplexity answer you would actually reuse and run the verification routine on its load-bearing claims. The aim is to make clicking the citations automatic, because a citation marks where to check, not proof that the claim is right.

- Identify the two or three claims the answer truly rests on and write them down.
- Click the citation next to each and confirm the source genuinely says it — not something adjacent.
- Check each source: who published it, how recent it is, primary or a summary of a primary.
- For any claim whose source is weak or mismatched, re-search it and find a better source.

Worksheet: Source Quality Scorecard

Fill this for the key sources behind one important answer. Scoring sources quickly is the habit that separates a defensible finding from a confident guess. Use it until judging a source becomes instant.

Claim being supported

Source title and publisher

Publication date (recent enough? Y/N)

Primary or secondary source?

Independent or interested party?

Does the source actually state the claim, exactly? (Y / Partly / No)

Verdict: cite it / find better / drop the claim

Exercise: Run a Five-Step Research Thread

Pick a real topic you need to understand. Stay in ONE thread and walk it from broad to actionable using the follow-up moves. The insight you want is almost always three or four follow-ups past the first answer — prove that to yourself.

- Open broad: ask for an overview of the topic with sources.
- Narrow: ask which part has the strongest evidence or matters most.
- Quantify: ask for the specific numbers — how big is the effect, over what period.
- Stress-test: ask for the strongest counterargument or where it backfires.
- Converge: ask Perplexity to summarize the whole thread as a short, cited brief.

Exercise: Fact-Check to the Primary Source

Find a claim you have seen recently — a statistic in an article or a vendor's pitch. Use Perplexity to verify it and trace it back to where the number originally came from. Often the truth is more nuanced than the claim, and tracing it is the whole point.

- Paste the claim and ask Perplexity to confirm or refute it with authoritative sources.
- Ask where the number or fact originally came from — the primary source.
- Ask whether there is credible disagreement, and have it cite the other side.
- Click through to the strongest primary source and read the relevant passage yourself; note what the claim got right or wrong.

Spaces, Files, and Repeatable Research Workflows

Stand up a project Space with custom instructions, analyze your own uploaded documents, and lock in repeatable workflows for the research you do most.

Worksheet: Space Setup Planner

Plan one real research Space before you build it. A Space encodes your standards once so every thread inside it inherits them. Fill this, then create the Space exactly as planned.

Space name (project- or topic-specific)

The decision or question this Space serves

Custom instructions (citation standard, tone, source priorities, what to do when unsure)

Default Focus mode for this project

Files I will attach (only those that genuinely inform the research)

The first three research threads I will run inside it

Exercise: Analyze Your Own Document

Upload one real PDF, spreadsheet, or report you need to understand (avoid anything confidential you cannot share with a third-party service). Summarize it, extract its key figures with page references, then cross-check it against the live web. This is where Perplexity becomes a document analyst, not just a web searcher.

- Summarize the three most important points in this document for [my specific purpose].
 - List every key figure or data point with the page it appears on.
 - What does this document say specifically about [my topic of interest]?
 - Compare the key claims in this document against current public sources, and cite them.
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Exercise: Build and Run One Workflow End to End

Choose one of the four course workflows (market scan, fact-check, literature scan, comparison) and run it fully on a real need, including the verification step. Then write it down as a reusable script so next time it is a five-minute routine.

- Set the workflow's default Focus and gear, then run its opening question.
 - Run the workflow's standard follow-ups to deepen and quantify the answer.
 - Verify the load-bearing claims by clicking through to primary sources.
 - Write the whole sequence down as a named, reusable workflow script I can paste next time.
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Checklist: Research Practice Hardening Checklist

- At least one project Space exists with specific custom instructions
- Custom instructions enforce citing primary sources, dating figures, and flagging uncertainty
- I have run a real document through file upload and verified an extracted figure against the page
- My four core workflows are written down with their default Focus and gear
- Every workflow ends with a verification step on the load-bearing claims
- Separate Spaces exist for distinct projects so contexts do not blur
- I add a useful follow-up or workflow tweak whenever I discover one

Your Action Plan

1. Create a Perplexity account, confirm your plan, and consider Pro if you will rely on Pro Search and file uploads.
2. Click through every control once: Focus modes, the model picker, Quick vs. Pro, and file upload.
3. Run the three-tool showdown on one real question to internalize when Perplexity beats Google and a chatbot.
4. For your next research question, set the right Focus and use Pro Search instead of a default Quick search.
5. Sharpen the question with the five dials before you run it, and ask for citations and a format.
6. On every answer you will reuse, run the thirty-second verification and click through to the load-bearing sources.
7. Mine important topics with a five-step follow-up thread, ending in a cited summary instead of accepting the first answer.
8. Create a Space for any multi-session project, write custom instructions, and attach only the files that matter.
9. Upload one of your own documents and practice summarizing, extracting figures, and cross-checking against the web.

10. Write down your four core workflows (market scan, fact-check, literature scan, comparison) with their default Focus and gear, and reuse them.

