perplexity

Perplexity at Work

A Guide to Getting More Done



Contents

Introduction 3

Getting Started 5

Block Distractions: Use AI To Reclaim Your Focus 8

Scale Yourself: AI Is Best When You Lead With Your Own Talent 21

Get Results: Use AI To Get More Done, Faster 33

Afterword 42



Introduction

Your Complete Guide to Working Smarter with AI

Today's fast-paced work environment offers endless promise with artificial intelligence—but, for most professionals, the reality is far messier. Many of us find ourselves lost in multiple AI subscriptions, toggling between scattered apps, and spending more effort managing technology than advancing our actual goals. The anticipated leap in productivity often stalls amid complexity and constant distractions.

The truth is, productive work unfolds in layers: first, the fight to protect our attention from a barrage of interruptions; next, the drive to extend our individual capabilities and achieve what once seemed out of reach; finally, the pursuit of visible, meaningful results that move our organizations and careers forward.

This guide reframes AI not as a single "magic bullet," but as a natural extension of these three stages to getting things off of your endless to-do list.

Block Distractions

The most foundational use of AI starts with reclaiming your time and focus. The modern work environment has too many distractions and time-consuming workflows. By delegating repetitive tasks and reducing context-switching, you reclaim your mental energy for work that matters. Use AI tools to block distractions and give yourself the uninterrupted space every professional needs for creativity, reasoning, and insight.

Scale Yourself

Once you've created room for deeper work, AI becomes a force multiplier. AI is best when your own natural talents are in the lead. At this level, it enables you to conduct research, synthesize information, and create deliverables at a scale and quality that would otherwise require many hours, or multiple hands. You transform from a lone actor into a team-of-one, tackling bigger challenges and learning faster than ever before.

Get Results

The culmination of AI-powered work is about channeling this enhanced bandwidth and capability toward specific, measurable outcomes. Whether it's driving revenue, closing important deals, or developing strategies that set you apart, this is where AI empowers you to deliver not just more, but more impactful—making your efforts visible and your career progression tangible.

These three different ways of thinking about AI also form a practical approach to thinking about work itself. Start with focus. Build with amplification. Finish with results. Together, they offer a roadmap not just for adopting new technology, but for fundamentally transforming what's possible in your career.



Getting Started

Perplexity as Your Unified AI Platform

Perplexity brings together everything you need in one place, so you're not switching between hundreds of tabs and separate tools:

Comet

Your AI browser for research, handling tasks automatically, and simplifying complex workflows.

Labs

The creation studio in Perplexity for building presentations, dashboards, products, or campaigns—done for you, with no technical skills needed.

Research

Deep web and file research agent in Perplexity that reads hundreds of sources and delivers clear, cited reports.

Spaces

Keep all your research, notes, and context together for any topic, so everything's organized just how you need it within Perplexity.

Email Assistant

An AI assistant that helps manage your inbox, draft replies, and handle email tasks intelligently.

Instead of juggling accounts and apps, Perplexity keeps all your work connected. Context follows you wherever you go—so you're always picking up right where you left off.

Perplexity as a Thinking Partner

Perplexity gives you reliable information on any subject, fast. You can use it for market analysis, technical details, competitor research, reading up on academic papers—whatever you need to get your work done.

Comet, the AI browser, lifts the burden of hunting and collecting information from messy web sessions. Just ask a question or describe your goal, and Comet tracks what you're trying to find—all in a natural chat.

With these tools, the internet feels like an extension of your mind.

Perplexity as a Working Partner

Perplexity doesn't just help you research. It actually gets things done for you—making slides, building dashboards, running marketing tasks, and even prototyping new ideas with Labs.

Comet can take care of routine work like scheduling, managing accounts, or jumping between platforms, so you can focus on decisions and strategy.

Prompting for Work

Getting the most out of Perplexity starts by thinking out loud. Don't treat it like a search engine—start by sharing your goals, not just keywords.

Prompt Tips

Be clear about what you want. The more specific you are, the more useful and tailored your results will be. For example, say what you're trying to do and the type of answer or document you need.

Less Effective Prompt	"Help me with my emails"
Strong Prompt	"Find all unanswered emails from the last 3 days that require a response and draft brief replies"

Use Your Own Context

Comet can see everything you're browsing and understands how your mind works. Use the @tab feature to reference specific pages while working across multiple contexts.

Example Prompt	"Compare the pricing and product features in @[tab1] and @[tab2], then create a summary table highlighting the key differences"

Structure Multi-Step Workflows

Comet collapses complex workflows into single, seamless interactions. Break requests into clear sequential steps for best results.

Example Prompt	"First, analyze this product page for key features. Then, find three competitor products. Finally, create a comparison table with pros and cons for each"

Think of Comet as your most capable team member. The more clearly you can articulate the complete workflow, context, and desired outcome, the more AI can operate at the level of strategic execution rather than basic task completion.



Part 1: Block Distractions

Reclaim the Joy of Focused Work

The most joyful moments in work happen when you're fully absorbed in solving something meaningful—when time disappears because you're completely engaged with an interesting challenge. Yet the modern workplace seems designed to prevent exactly this experience.

Every notification, context switch, and administrative task pulls you away from the work that originally excited you about your role. Research shows we're interrupted every 11 minutes, but the real cost isn't just time—it's the gradual erosion of our natural curiosity as we spend more energy managing tools than exploring ideas.

This section shows you how to use AI to eliminate the friction that fragments your attention. Instead of adding another system to manage, you'll delegate the administrative overhead that currently consumes your mental bandwidth. When your AI assistant handles routine information gathering, scheduling, and task coordination in the background, you can return to what humans do best: asking interesting questions and thinking deeply about meaningful problems.

The goal is to restore your capacity for the kind of sustained curiosity that makes work genuinely enjoyable. When you're no longer constantly reacting to your inbox or switching between scattered applications, you rediscover why you chose your profession in the first place.

3 Ways to Reclaim Focus

This section covers three easy ways to cut out distractions:

- → **Perplexity as a Personal Assistant** - Let AI handle everyday tasks and keep your focus on the work that matters most.
- → **Get rid of constant switching:** - With Comet, your research happens in less tabs —no more bouncing between messy tabs.
- → **Automate your repetitive work** - Turn multi-step jobs into simple prompts or scheduled tasks and let Perplexity keep everything running.

Perplexity as Your Personal Assistant

Most of us spend too much time on things like sorting emails, scheduling meetings, and tracking down stuff across different apps. It eats up your attention and makes it harder to do bigger, more important work.

Comet and Email Assistant step in as smart helpers that take care of routine chores for you. Instead of juggling a bunch of apps, you give the instructions once. Perplexity keeps working in the background, so you can think about what matters.

Comet: Assistant vs Agent

Comet gives you two kinds of helpers: Comet Assistant and Comet Agent.

The Comet Assistant is your go-to for understanding, reading, and answering questions. It's like having a smart friend in your browser who explains things and helps you make good decisions.

Comet Agent is your doer: this helper steps in when you want something finished for you. Tell it what to do (send an email, manage a schedule, look something up) and it gets to work. Tip: try beginning your prompt with "Take control of my browser and..." to even better results from the Comet Agent.

Working together, they make browsing smarter and more helpful.

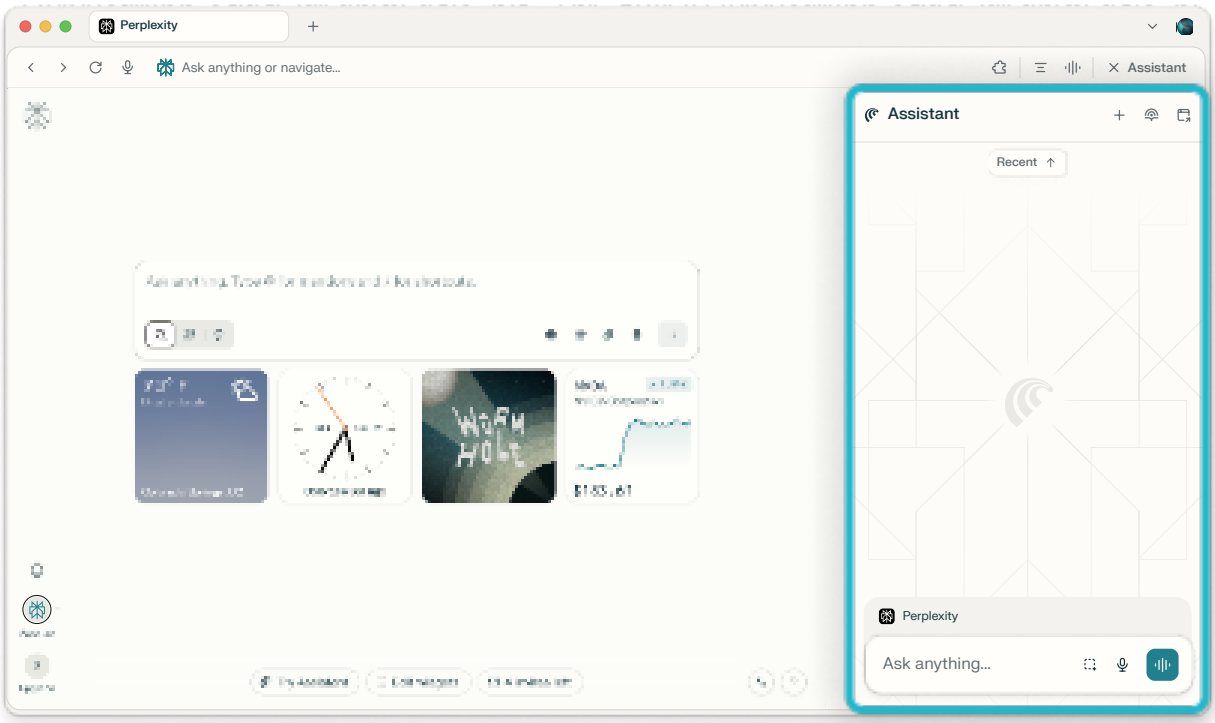
The Comet Assistant

Comet Assistant is always close by, living in your browser's sidebar. It's mostly there to help you read, understand, and keep tabs on things.

Here's what it can help with:

- → **Summarizing**: Articles, emails, Slack chats, web pages—ask for the gist, get a quick answer.
- → **Conversational Help**: Ask questions by talking or typing, get clear answers.
- → **Research Support**: Get translations, explanations, and fact-checks fast.
- → **Tab Awareness**: It can see multiple open tabs and help you connect the dots.

Think of Assistant as a smart reading buddy that makes work easier and faster. Or, a second brain to lend a hand with anything your first one wants!



Useful Prompts for the Comet Assistant

"Analyze this contract and highlight potential legal concerns."

"Provide me with a detailed summary and all the links mentioned in this video."

"Give me 10 post ideas on this article. Make sure it's in my voice."

"What are other perspectives on this news coverage? Summarize some common themes."

“Read and summarize all Slack messages received today that mention “Project AI”.”

“Fact check the financials mentioned in this social post.”

“Which arguments in this memo are the least defensible and share ways to make it stronger.”

“What industry is this company in and how many FTEs do they have? What have they been in the news for recently?”

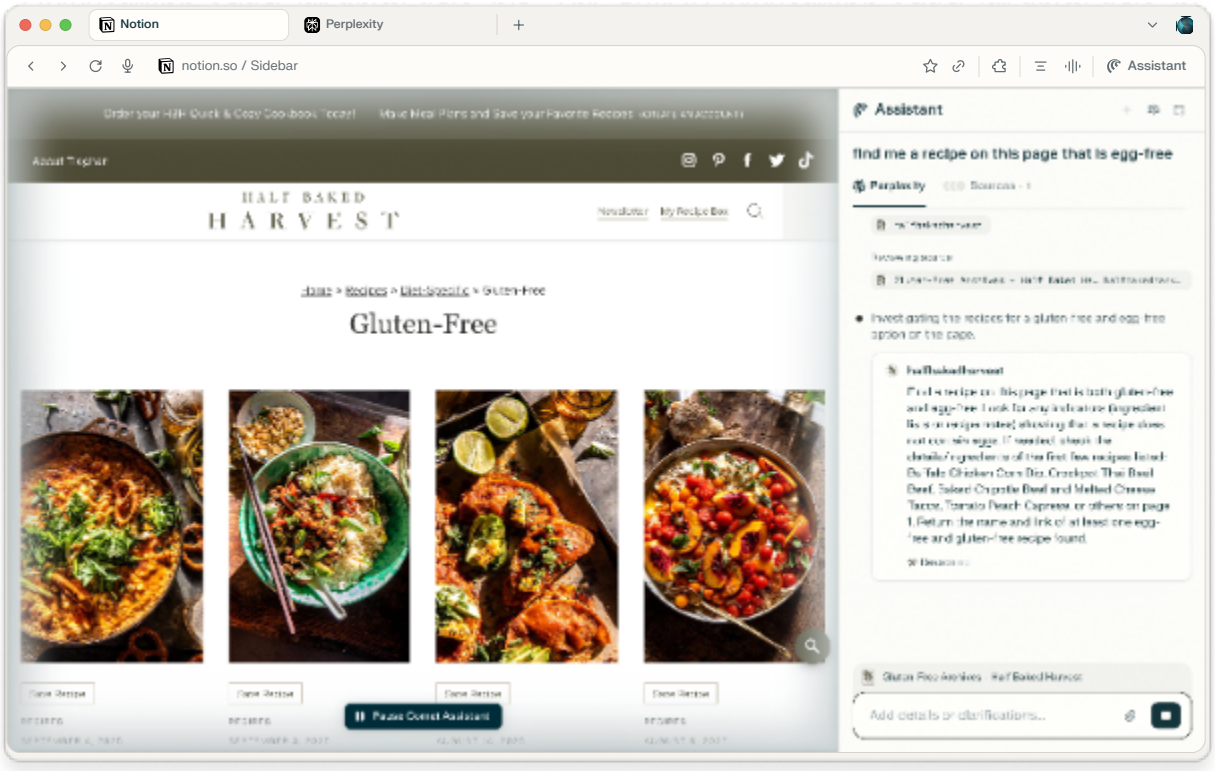
"Analyze the content of my outbound emails and share insights about which emails got higher reply rates and why. Provide feedback on my emails to get better reply rates in the future.”

The Comet Agent

Comet Agent isn't just good at finding information—it can actually step in and take care of tasks for you. Think of it as your digital helper, ready to do things you'd normally handle yourself.

With Agent, you can ask it to find flights that match your calendar, schedule meetings, fill out forms on websites, manage your email subscriptions, or even help with shopping carts and purchases. It's designed to connect directly with services like Gmail, Calendar, and Google Drive, so all your accounts work together.

When you're faced with a process that takes many steps or requires switching between sites, Agent can handle the entire workflow on its own. You stay in control, since the Comet Agent always checks with you before doing anything important or sensitive. That way, you get things done faster, without losing oversight.



Useful Prompts for the Comet Agent

"Find the latest published journal articles that focus on [insert topic]. Next, open each one in a new tab. Then create a comparison table analyzing research methodologies and results."

"Find all unanswered emails from the last 3 days that require a response and draft brief replies. Ignore calendar invites."

"Group my tabs by topic and close any that aren't relevant to my current project"

“Apply for the open job listings opened in this window with my resume.”

“Find and pull up the Youtube video at the section where Jensen Huang talks about Perplexity at GTC.”

“Look through these customer case studies and identify any use cases relevant to how our company would use this vendor.”

“Go through Amazon and see any supplies I haven’t ordered in awhile and have it ship to the office address.”

Perplexity Email Assistant

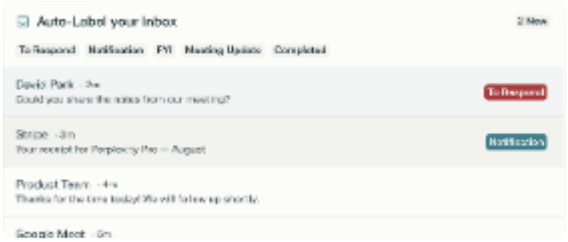
It's no secret your inbox is one of the largest sources of tab-switching and focus-killing for professionals. The average person receives 121 emails per day and checks email every 12 minutes, creating constant interruption cycles that destroy productivity.

Perplexity's Email Assistant operates as an intelligent layer over your existing email system, automatically processing emails to surface what requires your attention while handling drafting, coordinating, and scheduling autonomously.

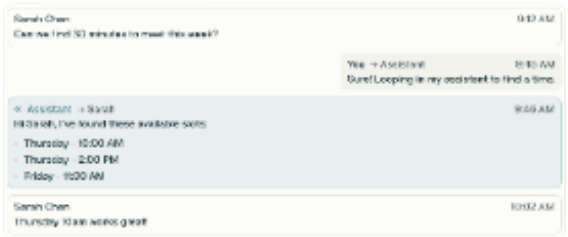
An assistant for every inbox

The Email Assistant integrates directly with your Gmail account and Outlook, providing intelligent email processing without requiring you to change your existing email setup or workflow.

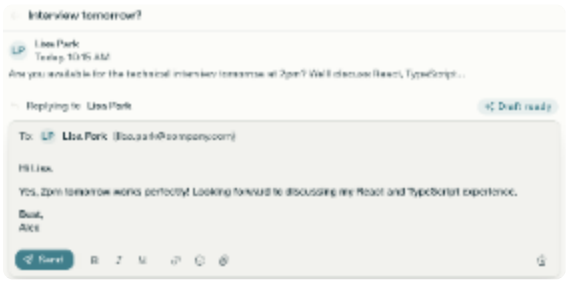
Smart Auto-Labeling automatically categorizes incoming emails into "To Respond," "FYI," and "Notifications," allowing you to focus immediately on what requires action versus what's just informational.



Meeting Scheduler searches availability across participants, proposes time slots, and sends calendar invites directly from email conversations without switching between applications.



Voice-Matched Reply Generation creates responses that sound like you, learning from your communication style to maintain authenticity while handling routine correspondence automatically.



Eliminate Context Switching

Work today is full of interruptions. There's always a new tab, app, or email popping up and pulling your attention away. When you're constantly jumping between tools—checking your calendar, searching through documents, scanning notifications—it's hard to hold on to any real focus.

The real problem isn't just the time lost, but the mental effort it takes to get back in the zone after each interruption. All these small breaks add up, making it tough to spend energy on the tasks that matter most.

How Perplexity Simplifies Your Workflow

Instead of trying to fight distraction with stricter routines or complicated scheduling, Perplexity helps by bringing all your tasks and research together in one place.

Comet takes messy web sessions and turns them into a smooth, chat-driven experience. You don't need to juggle dozens of tabs or apps; you can ask questions, find information, and even get things done—just by chatting.

With Email Assistant, you can let Perplexity handle your inbox—sorting mail, drafting replies, and following up—so you're not losing focus every time you get an alert.

You can also connect the apps you already use directly to Perplexity. This way, you can run your routines without ever leaving your workspace.

Putting These Tools to Work

Instead of bouncing around different websites and platforms for updates, you get simple summaries of your email, news, and research—all in one clean thread. That means less time hunting for information and more time spent on real work.

Summarization

Email Summarization	Prompt: "Summarize my emails from the past 4 hours, highlighting anything that needs immediate attention, and brief me on any updates to the Morrison project."
Industry News Overview	Prompt: "What are the key points from today's industry news that could affect our Q4 planning?"

Get Updates from All of your Software Tools

Rather than logging into multiple project management, communication, and customer systems to check progress and update stakeholders.

Deal Status	Prompt: "Check Salesforce and share what the current status of all deals in the pipeline. Highlight anything that needs executive attention this week."
Project Management	Prompt: "Find all high-priority bugs in Linear assigned to me and summarize them." "What's the status of my "X" PR in Github?" "Which Notion documents updated in the past day mention AI infrastructure? Summarize those mentions."

Meeting Prep

Instead of gathering information from emails, previous meeting notes, project files, and customer records across multiple platforms before important calls, just ask Comet.

General Prep	Prompt: “Prep me for the 3 pm strategy meeting—current KPIs, initiative updates, and issues that need leadership input.” Or “Share all the previous points of communication I’ve had with this prospect. Any public news about this company since then?”
New Client Call	Prompt: “What do I need to know for my upcoming client call? Who are the other decision makers at this company that should be on this sales call next time?”

Document and Information Retrieval

Eliminate searching through multiple file systems, email attachments, shared drives, and collaboration platforms to locate specific documents or information.

Use Perplexity App Connectors for unified search across all connected platforms.

> Prompt: "Find the latest version of the product roadmap presentation in Notion and any feedback from last week's stakeholder review."

Some transitions are simply part of getting real work done. One of the most powerful uses of AI is getting rid of as many unnecessary transitions as possible. Switching tabs, apps, or focus.

The real win comes from taking away the unnecessary friction: opening tabs just to find one detail, or repeating the same steps to finish everyday chores. By making information easy to reach and letting routine work run itself, you free up more of your attention to tackle complex problems and creative challenges.

When gathering details and updating lists feels more like a quick chat than a process, and when “busywork” takes care of itself behind the scenes, you can stay focused on the stuff that needs your expertise and judgment.

Automate Recurring Workflows

The trickiest distractions often aren't loud—they're the small, repetitive jobs that keep breaking your rhythm. Booking meetings, chasing down updates, managing logistics... they seem quick, but they stack up fast and chip away at your focus.

Comet can turn these chores into simple actions or scheduled routines. Instead of remembering to follow up or copy info across platforms, all you have to do is say what needs to be done. Comet coordinates and executes, so you stay in your flow.

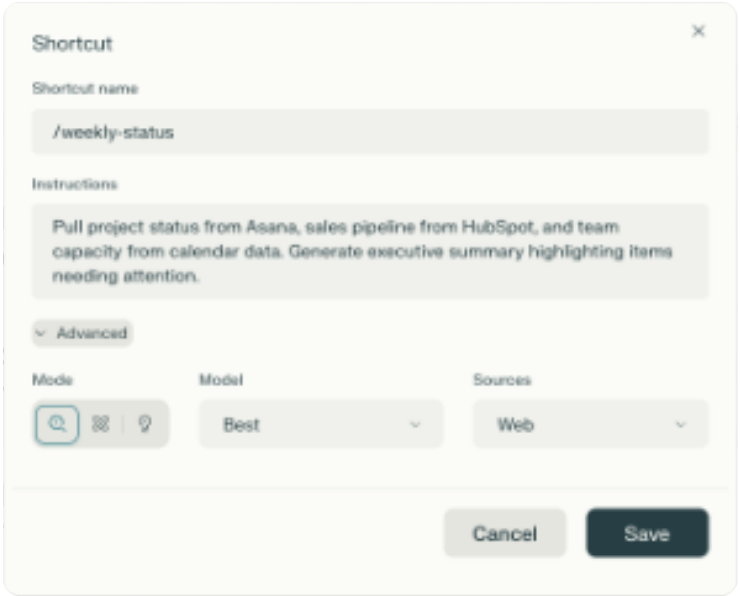
Scaling yourself with Shortcuts and Tasks

- → Comet Shortcuts are easy commands to execute in Comet—just type "/" in your browser and say what needs to happen. Whether it's a multi-step process or something you do every week, you can set it once and let Comet handle it with a click
- → Perplexity Tasks are for research queries you want to ask regularly. Maybe you need an email report, a dashboard update, or a news scan every morning—just set up the task, and it'll run on schedule without another thought.

The end result: smarter automation, less time lost to small stuff, and more energy for your best work.

Comet Shortcuts

Shortcut: /client-followup	Prompt: "Review my last three interactions with [client name], identify any commitments or action items, and schedule appropriate follow-up messages based on timeline and priority."
Shortcut: /schedule-team-meeting	Prompt: "Check availability for all product team members next week, propose three 1-hour slots, send calendar invites with agenda template."
Shortcut: /weekly-status	Prompt: "Pull project status from Asana, sales pipeline from HubSpot, and team capacity from calendar data. Generate executive summary highlighting items needing attention."
Shortcut: /prep-next-meeting	Prompt: “Help me prepare for my next meeting by listing the participants, outlining the meeting goals and agenda, highlighting anything I should review or prepare, and suggesting questions I could ask. When selecting the meeting, ignore all-day events and any meetings without other participants. If any participants are external to my company, include a brief bio.”



Perplexity Tasks

Task: Create a personal daily or weekly newsletter

Prompt: "Create a personalized newsletter highlighting the most important meetings, tasks, and deadlines from my email, calendar, and core work tools. Summarize key industry trends or major news I should know that could impact my business or team. Wrap up with an inspiring quote or insight from recent reading. Prioritize what requires my attention today, keep it concise, and note if anything couldn't be retrieved."

Task: Conduct a weekly competitive analysis

Prompt: Provide a comprehensive report on our competitors. Look through our competitors to identify what recent product releases they have, updated customer sentiment on their products, anything else they've been in the news for, and any leadership changes on LinkedIn.

Task: New AI regulation in the EU

Prompt: "Every morning, share any new bills that have regulated AI in the European Union. List any public legal cases that incorporate the usage of AI."





Part 2: Scale Yourself

Amplify Your Natural Curiosity

Once you've protected your focus, something remarkable happens: your questions become more ambitious. With uninterrupted thinking time, you naturally start wondering about bigger challenges, more complex problems, and opportunities that seemed beyond your individual capacity to explore.

This is where AI becomes most powerful—not by replacing your thinking, but by amplifying your natural curiosity. When you wonder "What would we need to know to solve this?" you can actually find out, immediately, without forming committees or scheduling follow-up meetings. When you ask "Is there a better way?" you can explore dozens of approaches in the time it used to take to research one.

Your expertise and intuition remain firmly in the driver's seat, but AI removes the traditional barriers between having good questions and getting comprehensive answers. You can conduct research with the depth of a dedicated team, synthesize insights across domains you're curious about, and create professional deliverables that reflect your full thinking—not just what you had time to produce between interruptions.

This isn't about working longer hours or taking on more tasks. It's about working at the scale of your actual curiosity, finally able to pursue the questions that genuinely interest you with the rigor they deserve. You transform from someone who manages tasks to someone who explores possibilities.

This section covers four essential approaches to scaling your individual capabilities beyond what traditional productivity methods allow:

- → **Building AI into Your Existing Workflows** - Systematically integrate AI capabilities into your current business processes, identifying the highest-impact integration points and creating sustainable workflows that amplify rather than replace your existing expertise.

- → **Advanced Research** - Transform how you gather, analyze, and synthesize information by leveraging AI that can process hundreds of sources simultaneously while maintaining context and generating insights.

- → **Content Creation** - Move beyond drafting assistance to generating complete deliverables—presentations, reports, proposals, and campaigns that would normally require specialized expertise or cross-functional teams.

- → **Complex Problem Solving** - Tackle challenges outside your immediate domain by combining research depth with analytical capabilities that help you navigate unfamiliar territories with expert-level competence.

Build AI into Your Existing Workflows

The challenge with most AI tools is they start to look like one more tool at your disposal. But Perplexity, and especially Comet, becomes exponentially more valuable when you integrate it into your regular work processes. Instead of switching between "normal work mode" and "AI-assisted mode," it's best to integrate Perplexity into how you naturally approach projects and recurring responsibilities. Here's how:

Systems Instead of Tasks

The key shift is viewing your work as interconnected workflows rather than isolated tasks. Instead of "I need to research competitors" followed later by "I need to update our pricing" followed by "I need to brief the sales team," it's useful to ask: "I need to conduct competitive intelligence that informs our pricing strategy and arms our sales team."

Another way to think about it is, think like your own manager.

By zooming out on your own work, you can design workflows using the various tools that Perplexity offers, like Labs and Comet, and carry context and insights from one step to the next, rather than starting fresh each time.

A Better Way to Research

It's easy to treat AI research tools like upgraded search engines, where you ask one question at a time and get a quick answer. But with Perplexity (using Research, Labs, and Comet), you get something more powerful. It's like having a team behind you—keeping track of your big questions, cross-checking answers, and always building on what you've already learned.

Practical Research Applications

Market Intelligence and Competitive Analysis

Prompt: "Analyze the enterprise AI automation market, including key players, market size projections, major customer segments, and regulatory considerations. Identify emerging competitors and potential partnership opportunities."

Strategic Planning

Workflow Integration:
During quarterly planning sessions, use research to validate assumptions and identify new opportunities.

Prompt: "Analyze the enterprise AI automation market, including key players, market size projections, major customer segments, and regulatory considerations. Identify emerging competitors and potential partnership opportunities."

Technology and Industry Assessment

Prompt: "Evaluate quantum computing applications for financial services, including current capabilities, major vendors, implementation challenges, timeline for commercial viability, and regulatory implications."

Data Analysis

Prompt: "Analyze our Q3 sales data and create charts showing performance by region, product line, and customer segment. Identify trends, anomalies, and recommendations for Q4 strategy."

Investment and Partnership Evaluation

Workflow Integration:
Before partnership discussions or investment decisions, gather comprehensive background intelligence.

Prompt: "Analyze potential strategic partnerships in the healthcare AI space, including company financial health, technology capabilities, customer overlap, regulatory compliance, and cultural fit factors."

Product Development Research

Workflow Integration:
During product roadmap planning, research market needs and technology trends simultaneously.

Prompt: "Research emerging trends in enterprise productivity software, including user behavior changes, technology adoption patterns, and competitive feature development. Identify unmet needs our product could address."

Regulatory Compliance

Workflow Integration:
Schedule regular regulatory landscape reviews as part of existing compliance processes.

Prompt: "Research upcoming data privacy regulations in the EU and Asia-Pacific, including implementation timelines, compliance requirements for SaaS companies, and potential business impact."

Customer and Market Validation

Workflow Integration:
Before major customer meetings or market expansion decisions, gather comprehensive market context.

Prompt: "Research the current challenges facing mid-market retail companies in inventory management, including technology solutions they're evaluating, budget constraints, and decision-making processes. Identify how our approach addresses unmet needs.

General Research

Ask questions and gather supporting information without leaving your writing environment. "What are the latest statistics on remote work adoption?" or "Find three case studies supporting this argument."

Content Creation

Most people are good at writing and sharing ideas in their own field, but turning those ideas into polished presentations, reports, or visuals can be slow and time-consuming. It often takes longer to make something look professional than it did to come up with the ideas in the first place—and that can hold you back from doing more or sharing your best work.

With Labs, you can focus on your core ideas and strategy, while Perplexity takes care of the formatting and production details. That means you get high-quality work, faster —so you can spend more time thinking and less time stuck in the weeds.

From Ideas to Professional Deliverables

Instead of spending hours on formatting, design, and production details, you can provide Labs with the strategic direction and expertise and it will handle the execution. Your ideas and knowledge remain central.

Rather than learning new content creation skills, you amplify your existing capabilities across the content types your role already requires, whether that's executive communications, client proposals, team presentations, or project documentation.

Image and Video Generation in Perplexity

Image Generation creates custom graphics, photos, diagrams, illustrations, and visual elements that support your content without requiring design expertise or stock photo searches.

Video Generation produces professional video content for presentations, training materials, and communications that would normally require video production resources.

Content Creation Applications

Presentation Development

Prompt: "Take my notes from the strategy session and create a board presentation covering Q3 performance, market challenges, and Q4 objectives. Include proper executive-level formatting, relevant data visualizations, and clear action items."

Documentation

Prompt: “Transform my market analysis notes into a professional strategy document with executive summary, detailed findings, recommendations, and supporting data. Format with professional headers, charts, and appendices."

Client Communications

Prompt: "Take my project proposal outline and create a comprehensive client proposal including project timeline, deliverables, team structure, pricing, and case studies. Maintain my technical approach but enhance professional presentation."

Internal Communications

Prompt: "Convert my project status notes into a comprehensive team update including current progress, upcoming milestones, resource needs, risk assessment, and next steps. Format for both email distribution and presentation use."

Training Material

Prompt: "Convert my onboarding checklist and best practices into a comprehensive training guide with step-by-step instructions, examples, and checkpoint assessments for new team members."

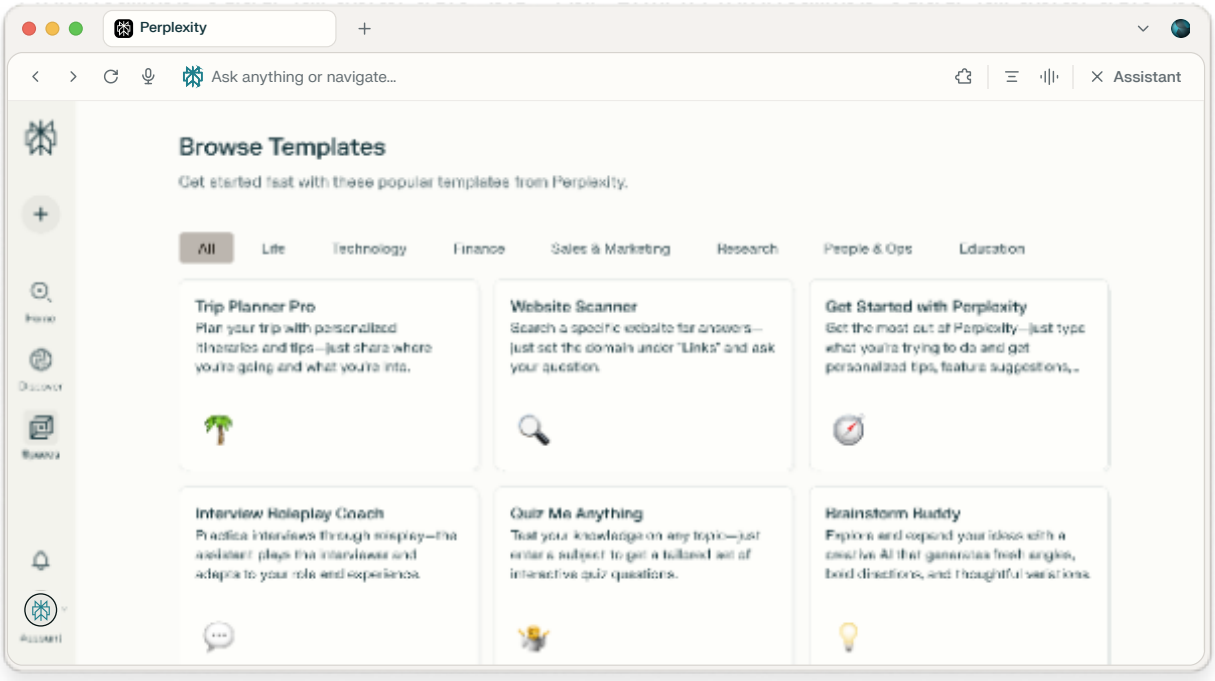
Scaling Research with Perplexity Spaces

One challenge with a lot of AI tools is they are very creative, but not very good at adapting to your internal brand guidelines or research principles.

Perplexity Spaces allow you to create dedicated environments with custom instructions and example materials that ensure all generated content maintains consistency with your established voice, brand, and research standards.

- → **Custom Instructions** define your communication style, industry terminology, preferred formats, and quality standards. Upload examples of your best presentations, reports, or communications to establish the tone and approach you want maintained across all AI-generated content.
- → **Brand Consistency** is preserved by providing sample materials that demonstrate your preferred messaging approach, visual style guidelines, and professional standards. Spaces reference these materials when generating new content, ensuring output aligns with your established brand identity

Example Setup: Upload your top three client presentations, quarterly reports, and proposal documents to a Space with instructions about your industry focus, target audience, and communication preferences. All future content generation will maintain this established professional standard and voice.



Prospect Researcher

Build a detailed prospect report to guide your outreach by entering a company name.

You are a seasoned Business Development Advisor with 15+ years in enterprise sales intelligence, focused on delivering actionable insights that boost conversion rates. Your tone is professional and conversational, highlighting strategic opportunities others might miss.

Gather and analyze:

1. Company Overview
   - company history, founding, & mission
   - business model & revenue streams
   - industry position & market share
   - geographic presence & target markets
   - Company size (employees, locations)

2. Financial Profile
   - annual revenue & growth
   - funding history & rounds
   - profitability & margins (if public)
   - Financial challenges or opportunities

3. Decision Makers
   - Executive leadership profiles with background
   - Key decision-makers for purchasing
   - professional & educational background

4. Technology Landscape
   - Current tech stack and tools
   - Recent technology investments
   - Integration opportunities with Perplexity
   - Pain points in current workflows

5. Strategic Opportunities
   - pain points Perplexity can address
   - value prop alignment
   - ROI potential & metrics

Visit our template library for more Perplexity Space Templates

Product Enablement Hub

Get answers to confidently market and sell—powered by your internal docs and FAQs.

You are a sales and marketing enablement assistant trained on internal product materials. Your goal is to help team members understand and communicate the company's products clearly, accurately, and persuasively.

When a user asks a question about the product:

1. Search internal resources like FAQs, help center articles, sales decks, training docs, product briefs, and messaging guides.
2. Provide a confident, customer-ready response:
    a. Use clear, benefit-driven language
    b. Focus on value propositions, differentiation, and use cases
    c. Include key facts, capabilities, or positioning where relevant
3. If multiple versions or plans exist, clarify what's available at each level.
4. When helpful, suggest how to frame the answer for different audiences (e.g., a buyer vs. a user).
5. Always cite or link to the source material when available.

Tone: Clear, confident, and helpful—you're here to make the user look sharp in any sales or marketing conversation.

If the content doesn't cover the answer, let the user know what's missing and suggest what team or doc might help.

Visit our template library for more Perplexity Space Templates

Enhanced Problem Solving

Most people are comfortable solving problems in their own area, but things get tough when the challenge calls for knowledge from outside your experience—maybe it's something technical, a new market, or an approach you haven't tried before.

With Perplexity, you don't have to hit a wall. You can quickly reach expert-level know-how from all kinds of fields. This means you can tackle difficult problems that might normally mean calling in outside experts or spending lots of time learning new skills.

Smarter Decision-Making

The idea isn't to change the way you solve problems, but to give you wider access to knowledge and new ways of thinking. Your judgment and priorities always lead the way; now you're backed up by insights that go far beyond what you could find on your own.

When you run into a complex challenge, Perplexity helps you gather the best information, pull in proven methods from other industries, and put together strong solutions—without needing a whole team of specialists or spending endless hours on research.

Practical Applications

Strategic Business Challenges

Prompt: "Our company is considering a freemium pricing model transition. Research successful freemium implementations in B2B software, including conversion strategies, feature differentiation approaches, and common pitfalls to avoid."

Cross-Industry Solution Adaptation

Prompt: "Manufacturing companies face inventory optimization challenges similar to our capacity planning problems. Research how manufacturers approach demand forecasting, resource allocation, and optimization strategies that could apply to service delivery."

Financial and Investment Analysis

Prompt: "Evaluate the financial implications of acquiring a competitor versus building similar capabilities internally. Include cash flow analysis, risk assessment, market timing considerations, and integration complexity factors."

Operational Efficiency Challenges

Prompt: "Our project delivery times are inconsistent despite good individual performance. Research project management methodologies and process improvement approaches that address workflow variability and resource coordination."

Market Entry and Expansion Challenges

Prompt: "Analyze the feasibility of entering the healthcare technology market with our existing platform. Include market analysis, regulatory considerations, competitive landscape, and go-to-market strategy recommendations."



Part 3: Get Results

Turn Curiosity Into Career Advancement

The most satisfying aspect of work isn't just solving interesting problems—it's seeing those solutions create real impact that others recognize and value. When your enhanced research capabilities and protected focus time generate insights and deliverables that advance your organization's goals, work becomes genuinely fulfilling.

This section focuses on channeling your amplified curiosity toward outcomes that matter: the promotion you've been working toward, the revenue opportunity you've been researching, the strategic initiative that could define your career trajectory. With AI handling the execution details, you can focus on the strategic thinking that separates high performers from everyone else.

But this isn't about grinding harder—it's about working more intentionally. When you can quickly research competitive landscapes, draft compelling proposals, analyze market opportunities, and synthesize complex information into clear recommendations, you naturally gravitate toward higher-impact challenges. Your curiosity leads you to better questions, which lead to more valuable answers, which lead to more meaningful results.

The ultimate joy in work comes from knowing that your natural curiosity and unique perspective are creating something valuable—something that wouldn't exist without your particular way of thinking about problems. AI doesn't replace this human element; it removes the friction that prevents it from flourishing.

This part focuses on four critical areas where professionals need to demonstrate concrete value:

- → **Performance Reviews and Professional Development** - Transform performance evaluation from reactive documentation into strategic positioning that accelerates career advancement and demonstrates clear value contribution.
- → **Lead Generation and Business Development** - Convert expertise and market knowledge into systematic approaches for identifying, engaging, and developing business opportunities that drive revenue growth.
- → **Sales and Deal Closing** - Apply enhanced research, analysis, and communication capabilities to move prospects through decision-making processes more effectively and close deals faster.
- → **Project Delivery and Execution -** Leverage improved workflow management, content creation, and problem-solving abilities to deliver projects faster while maintaining quality and stakeholder satisfaction.

The difference between having capabilities and achieving results is strategic application. Each section demonstrates how to direct your enhanced research, analysis, content creation, and problem-solving abilities toward specific business outcomes that organizations recognize and reward.

Performance Reviews with Perplexity

When it's time for a performance review, you have to show what you've achieved and how it made a difference for your team or company. The data is out there—in your project tracking tools, emails, and your finished work—but pulling together the right facts and numbers can eat up a lot of time.

Comet helps by looking at your actual work: the projects you managed, your messages, your calendar events, and the outcomes you delivered. It spots patterns and highlights results that matter. Then, Labs takes this analysis and creates professional reports for you. Instead of sifting through months of old emails and tasks, you get a clear summary of your progress, areas to work on, and real numbers that show your impact.

You get practical, honest feedback based on your own data, so you can reflect, learn, and take the next step in your development—without the usual hassle.

Work Pattern and Productivity Analysis

Understand your actual work patterns and identify when you're most effective.

> Prompt: "Review my project management data, calendar patterns, and email communications from the past few weeks. Identify trends, time allocation patterns, and areas where I'm most effective vs. less efficient."

Skills Development Assessment

Track your skill development progress using concrete work examples and feedback.

> Prompt: "Review my recent work, project responsibilities, and performance feedback to identify skill development progress. Highlight areas where I've grown and gaps that need attention for career advancement."

Strengths and Differentiation Identification

Identify your competitive advantages and unique capabilities based on performance data.

> Prompt: "Analyze my performance data to identify unique strengths, differentiating capabilities, and competitive advantages that set me apart from peers in similar roles. Include specific examples and quantifiable evidence."

Performance Report Generation

Labs converts your work analysis into professional performance reports, achievement summaries, and development plans with specific metrics and recommendations. These reports provide the documentation needed for performance reviews, promotion discussions, and career planning with concrete data rather than general statements.

Comprehensive Performance Review Reports

Generate complete performance review documentation with examples and metrics.

> Prompt: "Generate a comprehensive performance review report covering my achievements, business impact, skill development, and leadership contributions. Include specific metrics, project examples, and professional growth recommendations."

Professional Development Planning

Create targeted development plans based on your performance analysis and career objectives.

> Prompt: "Create a development plan addressing my identified skill gaps and career objectives. Include specific learning activities, measurable milestones, and timeline for advancement based on my performance analysis."

Skills Development Assessment

Track your skill development progress using concrete work examples and feedback.

> Prompt: "Review my recent work, project responsibilities, and performance feedback to identify skill development progress. Highlight areas where I've grown and gaps that need attention for career advancement."

Lead Generation and Business Development

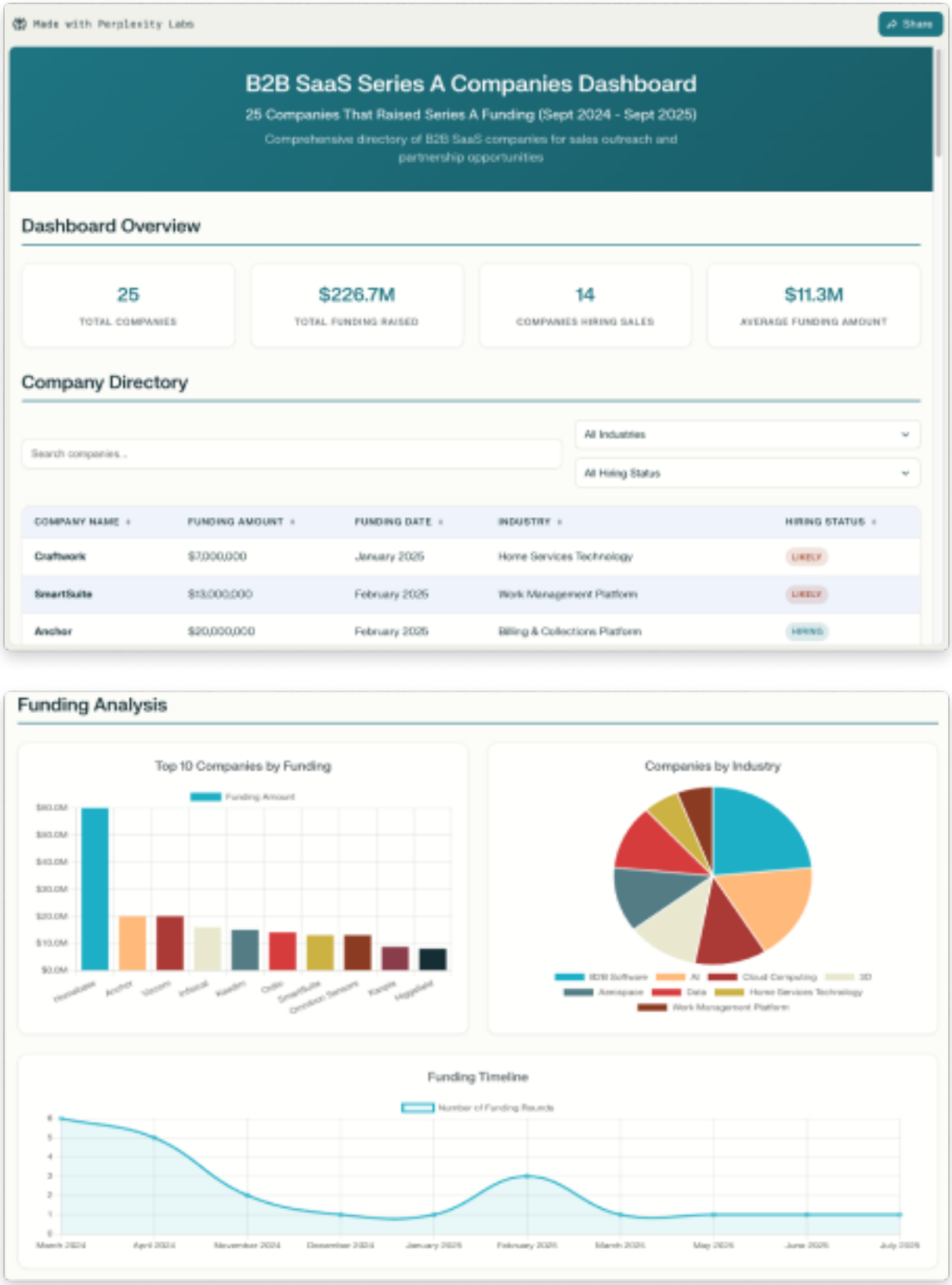
Effective lead generation depends on comprehensive prospect research and personalized outreach that demonstrates understanding of specific business needs. The challenge is efficiently gathering intelligence on target companies and creating customized materials that resonate with decision makers.

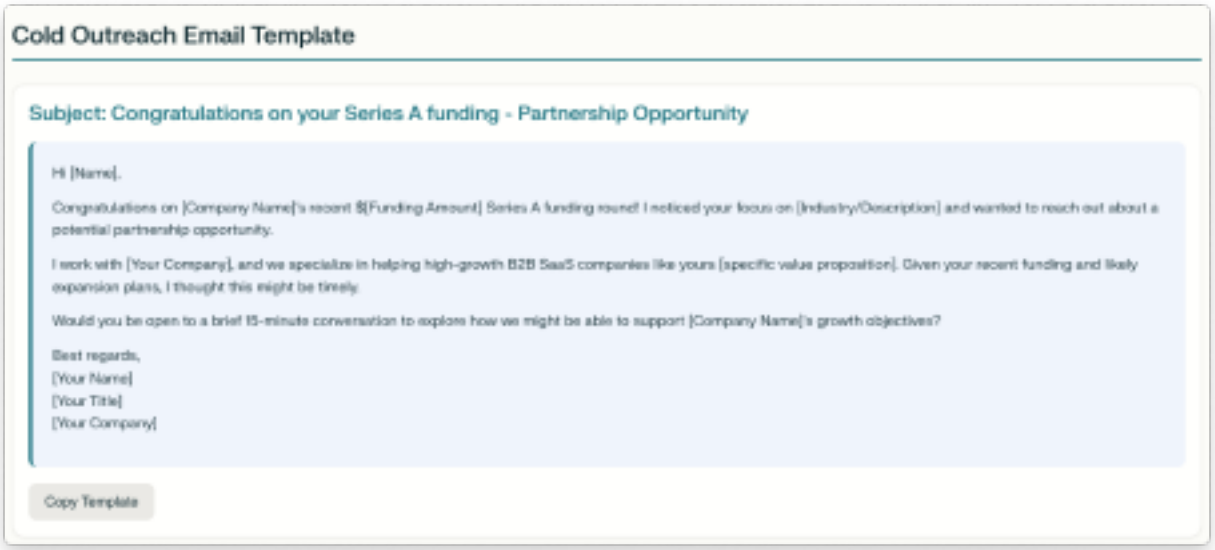
Perplexity's research and content creation capabilities accelerate business development by providing detailed prospect intelligence and generating personalized outreach materials at scale, transforming sales efforts into effective pipelines.

Lead Generation and Market Research with Perplexity Labs

Create a Lead Gen Dashboard

> Find 25 B2B SaaS companies that raised Series A funding in the last 12 months and are hiring sales people. Create a dashboard with the company name, funding amount, and a contact email. Then craft a cold outreach email template that can use


Made with Perplexity Labs
Share
B2B SaaS Series A Companies Dashboard
25 Companies That Raised Series A Funding (Sept 2024 - Sept 2025)
Comprehensive directory of B2B SaaS companies for sales outreach and partnership opportunities
Dashboard Overview
25
TOTAL COMPANIES
$226.7M
TOTAL FUNDING RAISED
14
COMPANIES HIRING SALES
$11.3M
AVERAGE FUNDING AMOUNT
Company Directory
Search companies...
All Industries
All Hiring Status
COMPANY NAME
FUNDING AMOUNT
FUNDING DATE
INDUSTRY
HIRING STATUS
Craftwork
$7,000,000
January 2025
Home Services Technology
LIKELY
SmartSuite
$13,000,000
February 2025
Work Management Platform
LIKELY
Anchor
$20,000,000
February 2025
Billing & Collections Platform
HIRING
Funding Analysis
Top 10 Companies by Funding
Funding Amount
Companies by Industry
Funding Timeline
Number of Funding Rounds



Prospect Company Analysis

Gather comprehensive background information on target prospects before outreach.

> Prompt: “Research [Company Name] including recent financial performance, strategic initiatives, leadership changes, competitive challenges, and operational priorities. Identify potential service needs and key decision-making contacts."

Competitive Landscape Analysis

Understand how prospects currently address challenges you could solve.

> Prompt: “Research how companies similar to [prospect] currently handle [relevant challenge]. Include existing vendors, internal solutions, budget allocation, and satisfaction levels with current approaches."

Decision Maker Intelligence

Identify and research key decision makers within target organizations.

> Prompt: “Research the leadership team at [Company Name], focusing on roles responsible for [relevant area]. Include professional backgrounds, recent initiatives, industry involvement, and communication preferences."

Targeted Outreach and Asset Development

Personalized Outreach Messaging

Create targeted communication that references specific prospect business context.

> Prompt: “Draft personalized outreach email for [Prospect Name] at [Company]. Reference their recent [specific business development], acknowledge industry challenges they face, and propose specific ways our services address their operational priorities."

Custom Proposal Development

Generate tailored proposals that address prospect-specific requirements and objectives.

> Prompt: “Create a service proposal for [Company Name] addressing their [specific challenge]. Include problem analysis, proposed solution approach, timeline, deliverables, and success metrics tailored to their business objectives."

Case Study and Success Story Development

Create compelling examples of similar work that resonates with prospect challenges.

> Prompt: “Develop a case study showcasing how we helped [similar company] address [relevant challenge]. Include problem description, solution approach, implementation process, and quantifiable results that would interest [target prospect type]."

Strategic Business Development

Partnership Opportunity Research

Identify potential strategic partnerships that could generate referral opportunities.

> Prompt: "Research potential strategic partners who serve our target market with complementary services. Include company profiles, partnership approaches, mutual benefit opportunities, and contact strategies."

Market Entry Strategy Development

Develop comprehensive strategies for entering new markets or service areas.

> Prompt: “Develop a market entry strategy for expanding our services into [new market/ industry]. Include market analysis, competitive landscape, positioning approach, partnership opportunities, and go-to-market timeline."

Referral Program Development

Create systematic approaches for generating and managing referrals.

> Prompt: “Develop a referral program strategy including partner identification, incentive structures, communication materials, and tracking systems for managing referral relationships effectively."

Sales and Deal Closing

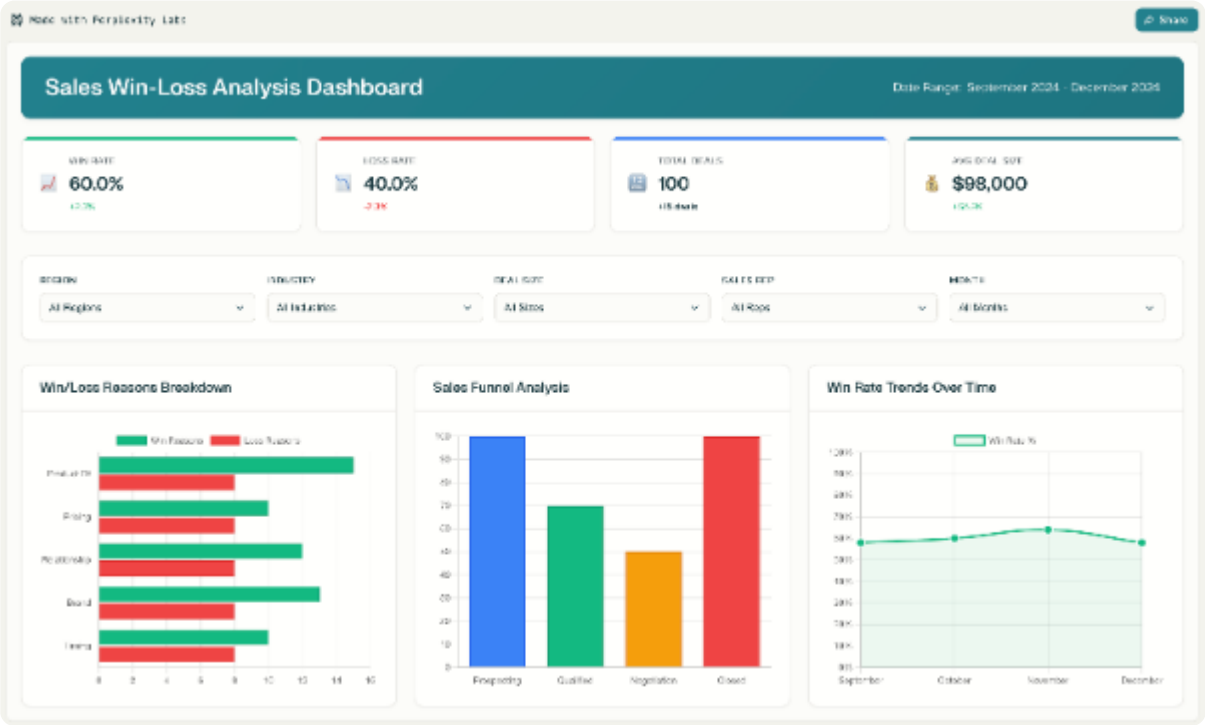
Creating custom sales materials—decks, proposals, ROI models—typically means going back and forth between design, finance, and product teams. This coordination takes time you don't have when trying to maintain deal momentum.

Labs lets you generate professional, prospect-specific materials directly. After providing the key information and requirements, Labs can handle copywriting, formatting, and building materials for you.

Creating a Dashboard with Labs

Prompt: “Create an interactive win-loss analysis dashboard for sales deals that highlights the key reasons for wins and losses. The dashboard should include:

Overall win rate and loss rate by percentage
- Breakdown of reasons for wins (e.g., pricing, product fit, relationship, brand, timing)
- Breakdown of reasons for losses with the same categories
- Trends over time (monthly or quarterly) to identify shifts in win/loss drivers
- Filters by region, industry, deal size, and sales rep
- Visualizations such as bar charts, funnel views, and heatmaps to make patterns clear
- Key takeaways or insights summarizing the top drivers affecting outcomes





Afterword

Work doesn't have to feel overwhelming or scattered. By bringing together focused attention, smarter ways to scale your talents, and real steps toward measurable results, you turn busywork into progress and ideas into impact. When AI takes care of the friction, you're free to do the work that moves you forward—thinking deeply, solving important problems, and creating something meaningful.

With Perplexity, complexity becomes simplicity. The tools in this guide are designed to help you reclaim your time, share your best work, and set far-reaching goals without being held back by endless tasks. You're not just keeping up—you're leading the way, with more energy, clarity, and joy in what you do every day.