

AI PLAYBOOK 22

AI Deep Research Agents: Step-by-Step Get Started Guide



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This Playbook is part of the CMA's AI Mastery Series, empowering marketers to Implement AI in ways that earn regulatory confidence, maintain strong brand reputation, and foster consumer trust

Deep research vs. basic AI prompting

Most marketers are using AI for basic tasks like writing social media posts or email subject lines. But the real competitive advantage comes from deep research capabilities that changes how you gather market intelligence, understand competitors, and identify opportunities.

Deep research vs. Google search

Google search: Gives you links → You analyze and synthesize manually → Takes hours for comprehensive insights.

Deep research agents: Automatically gather from hundreds of sources, analyze patterns, synthesize findings, cross-reference for accuracy, and deliver comprehensive insights with citations → Complete analysis in minutes

The difference: Deep research agents don't just find information, they analyze, synthesize, and reason through complex business questions while providing the sources to back up their conclusions.

This isn't another theoretical guide about AI in marketing. This playbook provides exact prompts and workflows for using Perplexity, OpenAI, and Gemini to conduct market analysis, competitive intelligence, and trend research that replaces hours of manual work with minutes of AI-powered analysis.

Perplexity: Setup and first competitive intelligence scan

To access Perplexity's deep research capabilities, select "Deep Research" mode at the bottom of the search bar, describe your research topic in as much detail as possible (can lean on AI to help with drafting) and let the tool generate an in-depth report by breaking down your query and synthesizing from hundreds of sources. While free users have access with daily limits, Pro subscribers get more access to this feature designed for detailed, expert-level analysis of complex subjects.

Prompt

Monitor competitive activity for [Company A, B, C] in the Canadian market. Scan past 24 hours for product/pricing changes, business operations updates, marketing communications shifts, and customer feedback signals.
Output format: Threat Level, Key Development, Business Impact, Recommended Action.

Implementation

- **Step 1:** Create "Competitor Intelligence" collection in Perplexity Pro.
- **Step 2:** Replace [Company A, B, C] with your actual competitor names .
- **Step 3:** Select Deep Research mode → Paste prompt → Run analysis.
- **Step 4:** Save results to your collection for tracking over time.

Daily time investment: 5 minutes

Perplexity: Step-by-step market analysis

Replace weeks of traditional market analysis with comprehensive insights in 30 minutes, including market sizing, competitive landscape, and entry strategy recommendations.

Prompt

Analyze Canadian market for [product category] using multiple data sources. Calculate TAM using top-down approach from Statistics Canada data, validate with bottom-up customer population estimates. Break down by geographic and company size segments. Analyze 5-year growth projections and identify optimal entry strategy addressing Canadian regulatory requirements and cultural preferences.

Implementation

- **Step 1:** Replace [product category] with your specific market.
- **Step 2:** Select Deep Research mode → Paste prompt → Wait 3-5 minutes for comprehensive report.
- **Step 3:** Save to "Market Analysis" collection.
- **Step 4:** Export key findings to business planning templates.

Monthly time investment: 30 minutes.

Results

This approach delivers professional-grade market analysis comparable to costly consulting engagements while maintaining speed advantages that enable real-time strategic adjustment.

OpenAI Custom GPT: Build specialized competitive analyst

Custom GPTs transform OpenAI into specialized business analysts trained on your specific context.

Create 'Canadian Competitive Intelligence Analyst' GPT with this setup: name, description focusing on Canadian B2B/B2C market expertise, specific instructions including 10+ years experience, analysis framework, Canadian market expertise, output standards, and structured response format.

Upload your strategic documents, competitor profiles, and market research to create proprietary analysis capabilities. Use standardized prompts for competitive deep dives, scenario planning, and strategic response development. Your Custom GPT becomes increasingly valuable as you train it with specific market knowledge.

The competitive advantage is permanent and proprietary. Unlike generic AI tools, your Custom GPT understands your business context, competitive landscape, and strategic priorities. Teams report 3x improvement in analysis quality and 50% reduction in research time within first month.

Step-by-step GPT creation:

1. Go to OpenAI.com → Explore GPTs → Create a GPT.
2. Name: "Canadian Competitive Intelligence Analyst".
3. Description: "Expert competitive analyst specializing in Canadian B2B/B2C markets".
4. Upload strategic plan, competitor profiles, past market research.
5. Test with sample query: "Analyze [competitor] threat level in Canadian market".

OpenAI: Using deep research for customer search

To access OpenAI's deep research capabilities: Select "Deep research" from the tools menu in ChatGPT (requires ChatGPT Plus or Enterprise). Describe your complex research task, confirm details when prompted, and the system will work autonomously. You can interrupt anytime to give new instructions.

Prompt

Map complete customer journey for [product/service] targeting Canadian [demographic]. Analyze awareness stage triggers and information sources, consideration stage evaluation criteria and decision factors, purchase stage conversion triggers and channel preferences, post-purchase satisfaction and retention factors. Address Canadian market specifics including language preferences, regional differences, cultural factors, and economic sensitivity. Provide specific friction points, messaging optimization opportunities, and success metrics for improvements.

Implementation

- **Step 1:** Open ChatGPT → Select "Deep research" from tools menu.
 - **Step 2:** Replace [product/service] and [demographic] with your specifics.
 - **Step 3:** Paste prompt → Confirm research scope when prompted → Wait 10-15 minutes.
 - **Step 4:** Review comprehensive report → Extract top 3 actionable insights .
 - **Step 5:** Save findings to customer research folder → Share with relevant teams .
- Time investment:** 45 minutes total (15 minutes active, 30 minutes AI processing).

Results

Comprehensive customer journey analysis including friction points to address, messaging optimization opportunities, channel improvements, personalization refinements, and success metrics for tracking improvements.

Gemini: Multimodal competitive creative analysis

To access Gemini's deep research capabilities: Open Gemini Advanced → Select "Deep Research" feature → Upload visual content (images, videos, documents) alongside your text prompt. Gemini will analyze all content types simultaneously for comprehensive insights.

Deep research objective

Analyze competitor creative strategy across all content types - images, videos, social media, and websites - to identify positioning gaps and creative opportunities invisible to text-only research methods.

Prompt

Analyze competitor marketing creative and brand positioning across multiple content types. Review visual identity, social media strategy, advertising creative evolution, video content approach, and website optimization. Synthesize insights for competitive positioning opportunities and creative strategy recommendations. Focus on Canadian market cultural adaptation, bilingual content quality, and visual messaging effectiveness across diverse demographics.

Implementation

- **Step 1:** Collect competitor visual content (5-10 examples: website screenshots, social posts, ads).
- **Step 2:** Open Gemini Advanced → Select "Deep Research" → Upload content files.
- **Step 3:** Paste prompt above → Wait 5-10 minutes for multimodal analysis.
- **Step 4:** Extract top 3 creative strategy insights → Share with creative and brand teams.

Time investment: 30 minutes setup, 45 minutes analysis and application.

Weekly competitive intelligence sprint

Transform competitive intelligence from ad hoc research to systematic strategic advantage by investing 3 hours weekly as follows:

- **Monday (30 minutes):** Run Perplexity monitoring, check alerts, review competitor changes, document findings.
- **Tuesday (45 minutes):** Use Custom GPT for deep analysis, run scenario planning, cross-reference sales intelligence, update battle cards.
- **Wednesday (30 minutes):** Meet with teams, develop response strategies, adjust campaigns, plan proactive moves.
- **Thursday (45 minutes):** Use Gemini for market trend analysis, research customer sentiment, identify opportunities, update intelligence database.
- **Friday (30 minutes):** Create executive summary, update quarterly assessment, plan next week priorities, share findings with teams.

Results compound over time with faster threat detection, proactive strategic responses, improved market positioning, and measurable competitive advantages.



Your strategic
advantage
starts with
the next
prompt.

Advanced prompt engineering techniques

Leverage these three prompt techniques to elevate your approach.

- **Chain-of-thought reasoning breaks complex analysis into systematic steps:**

Analyze competitive position using systematic methodology. Show analysis for each step with supporting evidence.

Step 1: Market share analysis.

Step 2: Competitive advantage assessment.

Step 3: Vulnerability identification.

Step 4: Strategic response development.

- **Persona-based expertise assignment creates specialized analysis:**

You are Jane Doe, VP Marketing for successful Canadian B2B SaaS company with 8 years scaling experience. Based on your experience with similar companies, analyze [challenge] considering Canadian market dynamics, B2B sales cycles, and resource constraints.

- **Evidence-based validation ensures professional standards:**

Research [topic] with rigorous evidence validation. Require minimum 3 independent sources, Canadian market validation, confidence scoring 1-5, limitation acknowledgment.

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Troubleshooting common implementation issues

Three issues that derail most AI research implementations are outlined below so you can avoid them in your roll out.

- **Generic, unhelpful responses result from vague prompting.**
Solution: Use 5W + How framework specifying target customers, specific decisions needed, timeline context, Canadian market focus, business objectives, and implementation steps.
- **Information overload happens when AI generates comprehensive reports nobody reads.**
Solution: Executive Summary First format with 50-word decisions, 75-word business impact, 100-word implementation steps.
- **Inconsistent quality across team members destroys confidence in AI research.**
Solution: Create standardized prompt templates for each use case, save high-performing prompts in shared library, provide good versus poor output examples, establish peer review for critical analysis.

Quality control and validation protocols separate professional AI research from amateur experimentation. Investment in quality assurance pays dividends through improved decision-making and stakeholder confidence.

Implementation roadmap:

Months 1-3

Measure AI research impact through systematic performance tracking with clear progression milestones and measurable outcomes at every stage.

Week 1-2: Baseline establishment

Establish baselines for current research time investment, insight quality ratings, strategic decision speed, and stakeholder satisfaction scores. Document existing competitive intelligence cycle time, market analysis depth, and customer research frequency. Measure current cost per research project and time from insight to action.

Month 1: Operational efficiency gains

Achieve reduction in routine research time, improvement in insight quality scores from stakeholders, faster opportunity identification cycles, and increase in leadership decision confidence ratings. Demonstrate clear ROI through time savings and improved research comprehensiveness.

Month 2: Integration and process optimization

Complete workflow standardization across team members, integrate AI research into 3 core business processes (strategic planning, competitive response, customer experience), implement quality assurance protocols with accuracy goal validation, and demonstrate cost reduction versus external research vendors.

Month 3: Strategic Impact Demonstration

Achieve faster competitive threat detection versus traditional methods, increase in market opportunity identification, improvement in customer insight accuracy through validation studies, measurable campaign performance improvements (for example 20%+ increase in relevance scores), and documented strategic positioning advantages.

Implementation roadmap: 4 months onward

Month 4: Cross-functional adoption

Expand AI research integration to sales (battle card updates), product development (customer insight integration), and executive reporting (strategic dashboard implementation). Set a team adoption rate, establish advanced technique mastery among core researchers, and demonstrate competitive time-to-insight advantage versus industry benchmarks.

Month 5: Strategic planning integration

Integrate AI research into quarterly business planning cycles, present strategic insights to Board, establish competitive intelligence as permanent agenda item in executive meetings, and demonstrate measurable influence on a set percentage of major strategic decisions through documented research citations.

Month 6: Advanced capability validation

Achieve internal recognition as research center of excellence (measured by cross-departmental request volume), demonstrate strategic decision influence on a set percentage of major business initiatives, establish measurable competitive advantages (2-4 weeks earlier threat detection than competitors for example), and validate ROI through revenue protection and opportunity capture.

Teams achieving sustained excellence develop proprietary intelligence capabilities that drive executive-level strategic decisions with documented business impact. Industry recognition follows through measurable performance benchmarks. Success requires systematic tracking of both operational efficiency and strategic impact, progressing from tactical improvements to compounding competitive advantages.

Getting started

Step 1: Choose your highest-impact opportunity:

- Competitive monitoring for real-time threat detection;
- Customer research for behavior insights; or
- Market opportunity identification for growth planning.

Step 2: Select your primary platform:

- Perplexity for competitive intelligence;
- OpenAI for custom analysis; or
- Gemini for multimedia research.

Step 3: Copy exact prompts from relevant sections in this playbook, execute daily for one week, document results and business impact.

Step 4: Compile the initial first week results, refine prompts based on output quality, add second use case systematically, create standardized workflows for recurring needs, train additional team members on proven techniques.

Week 2-4 actions:

- Document 3 specific wins from first week implementation.
- Train 1-2 additional team members using your refined prompts.
- Create shared prompt library in Google Drive or SharePoint.
- Schedule weekly 30-minute team review to share findings.

Month 2-3 goals:

- Integrate findings into 1 major business decision.
- Present AI research summary to leadership.
- Identify 2 additional use cases for expansion.

Recommended reading and references

CMA Resources

- [CMA Guide on AI for Marketers](#)
- [Setting the Stage on Artificial Intelligence: A CMA Primer on AI for Marketers](#)
- [CMA Accountability Checklists for AI in Marketing](#)
- [CMA Mastery Series: AI Playbooks](#)

External References

- Glean: [25 + AI prompts for Marketing in 2025](#)
- ModelsProfileTree: [Perplexity AI for Market Research - Complete Guide](#)
- SKIM AI: [How to Use Perplexity AI to Conduct Market Research Analysis](#)
- AVO Automation: [Building AI-First Quality Assurance Strategy for Enterprises in 2025](#)

The CMA



This playbook is developed with guidance by the CMA AI Committee and is part of the CMA's comprehensive AI initiative designed to empower Canadian marketers with the knowledge, skills, and ethical frameworks needed to implement AI responsibly and effectively.

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Run your first
AI-supported
competitive
intelligence
scan.

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