



AI PRODUCTIVITY TOOLKIT / MODULE 07

AI RESEARCH ASSISTANT

SEARCH WITH PURPOSE.
VERIFY THE EVIDENCE.
SYNTHESIZE WITH CLARITY.

- 20-PAGE RESEARCH SYSTEM
- SOURCE QUALITY FRAMEWORK
- NOTES + CITATION WORKFLOW
- MASTER AI PROMPT + QA

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A controlled route from a clear research question to trustworthy sources, structured evidence, transparent citations and a useful final answer.

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FAST ROUTE

Complete the brief on pages 3-4, use the search and evidence workflow on pages 5-14, run the master prompt on page 17, then finish with the QA audit on page 19.

Define the research question

Strong research begins with a question narrow enough to investigate and important enough to answer. The AI Research Assistant should clarify the assignment before searching.

01 DECISION FIRST

Write the decision, explanation or deliverable the research must support. A topic is not yet a research question.

02 POPULATION AND CONTEXT

Specify who, where, when and under which conditions the answer must apply. Context prevents misleading generalization.

03 KEY CONCEPTS

Define ambiguous terms and list synonyms, related concepts, exclusions and competing interpretations.

04 SUCCESS CRITERIA

Describe the required depth, evidence standard, time range, geographic scope, output length and citation style.

AI RESEARCH ASSISTANT CHECKPOINT

- What must the reader be able to decide or understand?
- Which details would materially change the answer?
- What is explicitly outside the scope?
- Which claims require primary or expert evidence?

QUESTION FORMULA

How does [FACTOR] affect [OUTCOME] for [POPULATION] in [CONTEXT] during [PERIOD], and what evidence would support a responsible conclusion?

Build the research brief

The brief gives the AI Research Assistant a controlled operating environment. It reduces wasted searching, unsupported assumptions and polished answers that solve the wrong problem.

01 PURPOSE

State why the work exists, who will use it and what action may follow from the findings.

02 DELIVERABLE

Choose a report, comparison, literature review, recommendation, fact-check, annotated bibliography, briefing or data summary.

03 EVIDENCE RULES

Prioritize primary sources, official documentation, peer-reviewed research, recognized datasets and direct expert material.

04 CONSTRAINTS

Record deadline, language, access limits, privacy requirements, prohibited sources and known stakeholder concerns.

AI RESEARCH ASSISTANT CHECKPOINT

- Required sections and maximum length
- Citation format and link requirements
- Acceptable publication dates and regions
- Reviewers, owners and approval deadline

BRIEFING RULE

If the purpose, audience, evidence standard or deliverable is unclear, stop and ask questions before generating conclusions.

Design the search strategy

Search quality depends on query design, source selection and iteration. One broad query rarely produces a balanced evidence base.

01 CONCEPT BLOCKS

Separate the question into population, intervention or factor, outcome, geography, time and evidence-type blocks.

02 QUERY VARIATIONS

Combine exact phrases, synonyms, exclusions, domain filters, file types, author names and date ranges deliberately.

03 SEARCH SEQUENCE

Begin with orientation, move to primary sources and citations, then search specifically for disagreements, limitations and updates.

04 SEARCH LOG

Record query, engine or database, date, filters, useful results, gaps and the next query. This makes the process reproducible.

AI RESEARCH ASSISTANT CHECKPOINT

- Broad orientation query
- Primary-source query
- Contrary-evidence query
- Recent-update query
- Known-author or institution query

STOPPING RULE

Stop searching when additional credible sources repeat established findings and remaining gaps are documented rather than silently ignored.

Find the right sources

A long source list is not the goal. The AI Research Assistant should build a small, diverse and defensible evidence set matched to the claim being investigated.

01 PRIMARY SOURCES

Look for original studies, datasets, legislation, standards, filings, official records, technical documentation and direct statements.

02 SECONDARY SYNTHESIS

Use systematic reviews, respected reports and expert analysis to understand context and locate original evidence.

03 CITATION TRAILS

Follow references backward to foundations and forward to replications, corrections, critiques and newer developments.

04 SOURCE DIVERSITY

Avoid relying on one organization, region, methodology or commercial interest when the question requires broader coverage.

AI RESEARCH ASSISTANT CHECKPOINT

- Does the source directly support the claim?
- Can the original document be accessed?
- Is a newer version available?
- Does another credible source disagree?

DISCOVERY PRINCIPLE

Use search snippets only to locate sources. Never treat a snippet, AI summary or repost as sufficient evidence for a material claim.

Evaluate source credibility

Credibility is claim-specific. A reputable publisher can still offer weak evidence, and a useful source can be inappropriate for a particular conclusion.

01 AUTHORITY

Identify the author, institution, expertise, editorial process and accountability. Anonymous authority should be treated cautiously.

02 METHOD

Inspect sample, definitions, measurements, controls, analysis, limitations and whether the method can support the conclusion.

03 CURRENCY

Check publication and update dates, version history, corrections and whether the topic changes quickly enough to require newer evidence.

04 INDEPENDENCE

Look for funding, sponsorship, advocacy, sales incentives, conflicts and selective presentation. Disclosure informs interpretation.

AI RESEARCH ASSISTANT CHECKPOINT

- Primary, secondary or commentary?
- Peer reviewed, official or editorially reviewed?
- Transparent data and method?
- Relevant population and context?
- Material conflicts disclosed?

QUALITY SCORE

Rate relevance, authority, method, currency, transparency and independence separately. Do not hide a critical weakness inside one average score.

Capture evidence precisely

The AI Research Assistant needs an evidence record, not a pile of browser tabs. Capture what the source actually establishes and preserve enough context to verify it later.

01 CLAIM UNIT

Write one specific claim per record. Separate findings, interpretation, recommendation and speculation.

02 EXACT SUPPORT

Save the relevant quotation or data point within copyright limits, plus page, section, table, timestamp or dataset field.

03 CONTEXT

Record population, period, conditions, definitions, sample and limitations that control how the evidence may be used.

04 TRACEABILITY

Store author, title, publisher, date, URL or DOI, access date and a stable local identifier.

AI RESEARCH ASSISTANT CHECKPOINT

- Claim supported
- Evidence type
- Location in source
- Strength and limitations
- Contradictory evidence
- Citation-ready metadata

EVIDENCE RULE

Never upgrade association into causation, a small sample into a universal rule, or a source's interpretation into an established fact.

Create research notes that remain useful

Good notes separate source material from your own interpretation. They also make synthesis faster because every idea remains connected to evidence.

01 ATOMIC NOTES

Keep one idea per note with a clear title, evidence link and your explanation of why it matters.

02 THREE LAYERS

Label direct evidence, source interpretation and researcher inference. Mixing them creates accidental misinformation.

03 TAGS AND THEMES

Use consistent tags for question, subtopic, method, population, date, agreement, disagreement and confidence.

04 OPEN QUESTIONS

Maintain a visible list of missing definitions, unsupported claims, conflicts and follow-up searches.

AI RESEARCH ASSISTANT CHECKPOINT

- Source note: what the document says
- Concept note: how ideas connect
- Synthesis note: pattern across sources
- Decision note: implication for the deliverable

NOTE TEMPLATE

ID / research question / claim / evidence / context / source location / researcher interpretation / confidence / related notes / next action.

Compare agreement and disagreement

Research becomes valuable when sources are compared rather than summarized one at a time. Differences often reveal scope, method or definition problems.

01 AGREEMENT MAP

Group claims supported by several independent sources and note whether they use similar or different methods.

02 CONFLICT MAP

Identify direct contradictions, different effect sizes, inconsistent definitions and incompatible populations or periods.

03 EXPLANATION

Test whether disagreement comes from method, sample, context, incentives, timing, data quality or interpretation.

04 WEIGHTING

Give stronger, more direct and more relevant evidence greater influence without erasing credible minority findings.

AI RESEARCH ASSISTANT CHECKPOINT

- Claim or question
- Source position
- Evidence strength
- Population and context
- Reason for difference
- What would resolve it?

COMPARISON RULE

Do not manufacture balance between strong evidence and unsupported opinion. Represent disagreement in proportion to its evidential quality.

Synthesize without losing nuance

Synthesis combines evidence into an answer that is more useful than a sequence of summaries. Every conclusion should show how the evidence leads to it.

01 ORGANIZE BY QUESTION

Structure the output around subquestions, themes, mechanisms, timelines or decisions rather than the order sources were found.

02 BUILD THE CHAIN

Connect claim, supporting evidence, conditions, counterevidence, interpretation and practical implication.

03 CALIBRATE LANGUAGE

Use terms such as suggests, is associated with, supports, remains uncertain or is well established according to evidence strength.

04 PRESERVE LIMITS

State where findings apply, where they may not apply and which missing evidence prevents a stronger conclusion.

AI RESEARCH ASSISTANT CHECKPOINT

- What is consistently supported?
- What remains disputed?
- Which context changes the conclusion?
- What is the most defensible answer now?
- What should be researched next?

SYNTHESIS TEST

A reader should be able to trace every important conclusion back to evidence and understand why alternative interpretations were accepted or rejected.

Fact-check every material claim

Fluent AI output is not evidence. The AI Research Assistant must verify names, numbers, dates, quotations, definitions and causal statements against accessible sources.

01 CLAIM INVENTORY

Extract every factual claim from the draft and mark its importance, source and verification status.

02 PRIMARY VERIFICATION

Confirm important numbers and statements using the original document, official record, dataset or direct transcript.

03 CROSS-CHECK

Use an independent credible source when errors would materially affect a decision or public understanding.

04 CORRECTION PATH

Remove, qualify or replace claims that cannot be verified. Never keep a convenient statement because it sounds plausible.

AI RESEARCH ASSISTANT CHECKPOINT

- Names, roles and organizations
- Dates, units and calculations
- Quotes and page locations
- Study design and sample
- Current rules, prices or specifications

VERIFICATION STATUS

Use VERIFIED, PARTIALLY VERIFIED, DISPUTED, OUTDATED or UNSUPPORTED. The final draft should contain no unlabeled unsupported material claims.

Create transparent citations

Citations are part of the reasoning system. They let readers inspect evidence, distinguish sources and understand which claim each reference supports.

01 CLAIM PROXIMITY

Place the citation immediately after the claim or paragraph it supports. Avoid dumping unrelated references at the end.

02 SOURCE IDENTITY

Include author or organization, title, publisher, date and a stable URL, DOI or document identifier.

03 CITATION ACCURACY

Open every final link, confirm the title and verify that the cited location supports the wording used.

04 STYLE CONSISTENCY

Apply one required citation style consistently and keep a master bibliography generated from verified records.

AI RESEARCH ASSISTANT CHECKPOINT

- Every material claim has support
- No citation points only to a search page
- Links open the intended source
- Duplicate references are merged
- Access dates used when appropriate

CITATION WARNING

A citation does not make a claim true. Evaluate the evidence first; then cite the source accurately and within copyright limits.

Identify bias, uncertainty and limitations

Responsible research does not pretend uncertainty has disappeared. The AI Research Assistant should show what may distort the evidence and how that affects confidence.

01 SELECTION BIAS

Ask which sources, populations, languages, regions, outcomes and publication types may be missing.

02 MEASUREMENT BIAS

Check whether definitions, instruments, proxies or self-reports systematically change the observed result.

03 RESEARCHER BIAS

Use a prewritten question, search log, inclusion rules and contrary-evidence search to reduce confirmation bias.

04 AI LIMITATIONS

Record model knowledge limits, hallucination risk, inaccessible sources, citation errors and any step requiring human expertise.

AI RESEARCH ASSISTANT CHECKPOINT

- Known limitation
- Likely direction of distortion
- Severity for the conclusion
- Mitigation attempted
- Residual uncertainty

CONFIDENCE STATEMENT

State confidence separately for each major conclusion: high, moderate, low or unresolved, followed by the specific evidence-based reason.

Build a concise literature review

A literature review maps what is known, how it was studied, where findings agree and which gaps remain. It is not a list of article summaries.

01 SCOPE AND PROTOCOL

Define databases, dates, languages, search terms, inclusion criteria and exclusion criteria before selecting studies.

02 STUDY MAP

Group sources by theme, theory, method, population, period or result and record the strength of each evidence cluster.

03 CRITICAL SYNTHESIS

Compare methods and findings, explain contradictions and distinguish mature knowledge from emerging claims.

04 RESEARCH GAPS

Describe missing populations, weak measurements, inconsistent definitions, limited replication and unanswered mechanisms.

AI RESEARCH ASSISTANT CHECKPOINT

- Background and definitions
- Search and selection method
- Thematic or methodological synthesis
- Limitations of the evidence base
- Conclusion and research agenda

REVIEW PRINCIPLE

Report how sources were selected. A transparent small review is more credible than a large unexplained reference list.

Run a controlled research workflow

Separate planning, discovery, evidence capture, synthesis and verification. The AI Research Assistant can accelerate each stage, but accountability remains human.

01 PLAN

Approve the question, brief, evidence rules, risks and stopping criteria before searching.

02 COLLECT

Run documented searches, evaluate sources and capture citation-ready evidence in a structured register.

03 ANALYZE

Compare claims, map conflicts, identify gaps and draft a synthesis with calibrated confidence.

04 REVIEW

Fact-check, test calculations, inspect citations, evaluate limitations and obtain subject-matter approval when needed.

AI RESEARCH ASSISTANT CHECKPOINT

- Research owner
- Subject expert
- Data or methods reviewer
- Legal or compliance reviewer
- Final editor and approver

CHECKPOINT RULE

Do not move from collection to confident conclusions until critical claims have direct evidence and unresolved conflicts are visible.

Master AI Research Assistant prompt

Replace every bracketed field. Use PLAN ONLY when the question, evidence standard or source access still needs approval.

ROLE

You are a rigorous AI Research Assistant. Plan, search, evaluate, compare, synthesize and cite evidence without inventing facts, sources, quotations, statistics or certainty.

INPUTS

Research question: [INSERT] | Purpose and audience: [INSERT] | Scope, dates and geography: [INSERT] | Deliverable: [INSERT] | Evidence standard: [INSERT] | Required citation style: [INSERT] | Constraints and exclusions: [INSERT].

PROCESS

1. Audit missing or conflicting inputs. 2. Break the question into subquestions and search concepts. 3. Propose a search strategy emphasizing primary sources. 4. Create an evidence table with claim, source, context, strength and limitations. 5. Compare agreement and conflict. 6. Draft a calibrated synthesis. 7. Run a claim-by-claim verification and citation audit.

CONTROL RULES

Use only accessible, verifiable sources. Distinguish evidence, source interpretation and your inference. Never convert correlation into causation. Mark current facts that require fresh verification. Explain material disagreement. Quote minimally. Do not cite search results, AI summaries or invented references.

OUTPUT

Return: research brief; subquestions; search plan; source-quality register; evidence matrix; synthesis; contradictory evidence; limitations; confidence by conclusion; citation-ready bibliography; unresolved questions; final QA table. If I write PLAN ONLY, stop before drafting conclusions.

FINAL INSTRUCTION

Before presenting the answer, list every material claim that remains unsupported, disputed, outdated or dependent on inaccessible evidence. Do not hide uncertainty to make the output sound more complete.

REQUIRED EVIDENCE TABLE

- Claim and subquestion
- Source and exact location
- Context and limitations
- Verification status

CONFIDENCE LANGUAGE

- High: strong direct evidence
- Moderate: useful but limited
- Low: weak or indirect evidence
- Unresolved: material conflict remains

Worked example: compare AI note-taking tools

This fictional example shows how the AI Research Assistant converts a broad request into a controlled comparison without inventing product capabilities.

RESEARCH QUESTION

Which AI note-taking approach best supports a five-person remote team that needs searchable meeting records, clear consent controls and exportable action items within a modest budget?

Requirement	Evidence needed	Preferred source	Decision rule
Transcription	Accuracy conditions	Official docs + test	Usable in real meetings
Consent	Recording controls	Privacy / legal docs	Visible and configurable
Search	Index and retrieval	Docs + hands-on test	Finds named decisions
Actions	Extraction and export	Docs + sample output	Editable and portable
Integrations	Calendar and calls	Official integration list	Matches current stack
Pricing	Current plan limits	Official pricing page	Fits stated budget
Security	Storage and access	Security documentation	Meets team policy

SYNTHESIS PATTERN

- Separate verified capabilities from marketing language and reviewer impressions.
- Use the same scenario, meeting sample and scoring scale for every candidate.
- Record plan limits and verification date because features and prices change.
- Explain trade-offs instead of declaring a universal winner.
- Recommend a short controlled trial before organization-wide adoption.

EXAMPLE CONCLUSION

Select the option that best satisfies the approved requirements with verifiable evidence. If privacy or export documentation is incomplete, mark the recommendation conditional rather than guessing.

Final research quality audit

Run this audit before publishing, submitting or using the research to make a decision. A polished answer is not complete until it is traceable.

QUESTION

- Purpose and audience are clear
- Scope and exclusions are explicit
- Key terms are defined

SOURCES

- Primary evidence prioritized
- Authority and method evaluated
- Currency and conflicts checked

EVIDENCE

- Claims captured with context
- Contradictions represented fairly
- Unsupported claims removed

OUTPUT

- Conclusions match evidence
- Limitations and confidence stated
- Every final link verified

RELEASE DECISION

- READY: all material claims verified and limitations disclosed.
- CONDITIONAL: useful with clearly stated unresolved evidence or expert review.
- HOLD: critical source, calculation, citation or scope problem remains.

ACCOUNTABILITY

The human author or organization remains responsible for the final research, citations, interpretation and decisions - even when an AI Research Assistant accelerates the workflow.



MODULE COMPLETE / 20 OF 20

Ask clearly. Verify carefully. Conclude responsibly.

You now have a complete AI Research Assistant system for planning questions, finding and evaluating sources, capturing evidence, comparing claims, synthesizing findings, verifying facts and creating transparent citations.



REUSE THE SYSTEM

- Start every project with the brief and question framework.
- Keep one evidence register and one verified bibliography.
- Use the master prompt only with approved inputs and source rules.
- Run the final QA audit before publishing or deciding.
- Archive search logs, conflicts, limitations and future research needs.

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