

THE ENTITY OPTIMIZATION CHECKLIST

BY SHIFT COMMUNICATIONS

This checklist is designed to help you identify the profiles, databases and listings where your company appears.

Think of it as a comprehensive starting point rather than an exhaustive list. Many categories have niche directories or communities, and new AI-visible sources are appearing regularly.

It's also worth noting that not every entity surface deserves equal attention. Start with the sources that most influence buyer decisions and AI understanding, then expand over time.

HOW TO USE THIS CHECKLIST

- 1 Inventory every entity surface you can find.
- 2 Record the status for each and assign ownership.
- 3 Prioritize the sources that matter most.
- 4 Update outdated information.
- 5 Repeat quarterly and after major messaging or product changes.

ENTITY INVENTORY TRACKER TEMPLATE

SOURCE	CLAIMED	CURRENT	PRIORITY	OWNER	NOTES

The checklist is organized into 10 categories, from core company profiles to analyst firms. Focus first on the categories most relevant to your business model and buyers.

ENTITY SURFACES

1

Core Company Profiles & Knowledge Sources

Often among the most visible and highest-priority company representations

COMPANY PROFILES

- ☐ Bloomberg Company Profile
- ☐ Crunchbase

BUSINESS DATABASES

- ☐ ZoomInfo
- ☐ PitchBook
- ☐ CB Insights
- ☐ Owler
- ☐ Apollo
- ☐ Dun & Bradstreet
- ☐ OpenCorporates

LOCATION PROFILES

- ☐ Google Business Profile
- ☐ Bing Places
- ☐ Apple Business Connect & Maps
- ☐ Yelp
- ☐ Foursquare
- ☐ Local directories

KNOWLEDGE SOURCES

- ☐ Wikipedia (separate strategy)
- ☐ Wikidata
- ☐ Google Knowledge Panel (separate strategy)

2

Review & Buyer Decision Platforms

Particularly valuable for B2B software and technology

- ☐ G2
- ☐ Gartner Peer Insights
- ☐ TrustRadius
- ☐ Capterra
- ☐ GetApp
- ☐ Software Advice
- ☐ PeerSpot
- ☐ SourceForge
- ☐ Trustpilot
- ☐ Crozdesk
- ☐ Reviews.io
- ☐ GoodFirms
- ☐ Clutch (for service providers)

3 Industry Directories & Associations

Authoritative and rank well within specific verticals

- | | |
|--|---|
| ☐ Trade & industry associations | ☐ Industry certification directories |
| ☐ Professional organizations | ☐ Vendor directories |
| ☐ Standards bodies | ☐ Chambers of Commerce |
| ☐ Member directories | ☐ Consortiums |
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4 Partner & Ecosystem Listings

Often overlooked but valuable listings

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|---|---|
| ☐ Technology partner directories | ☐ Reseller directories |
| ☐ Integration partner pages | ☐ Marketplace partner pages |
| ☐ Alliance listings | ☐ Venture capital portfolio pages |
| ☐ Agency partner directories | ☐ Accelerator & incubator profiles |
| ☐ Channel partner listings | |
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5 AI Tool & Category Directories

An emerging category that is increasingly visible in AI-assisted buying journeys

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|---|--------------------------------------|
| ☐ There's An AI For That | ☐ TopAI.tools |
| ☐ Futurepedia | ☐ FutureTools |
| ☐ Toolify | |



Developer, Marketplace & Technical Ecosystems

Important for developer platforms, infrastructure companies and integrations

DEVELOPER PLATFORMS

- ☐ GitHub Organization
- ☐ Hugging Face
- ☐ Docker Hub
- ☐ npm
- ☐ PyPI

- ☐ Microsoft Marketplace
- ☐ Salesforce AppExchange
- ☐ Shopify App Store
- ☐ Atlassian Marketplace
- ☐ HubSpot Marketplace

APP & CLOUD MARKETPLACES

- ☐ AWS Marketplace
- ☐ Google Cloud Marketplace

INTEGRATION ECOSYSTEMS

- ☐ Zapier
- ☐ Other integration marketplaces



Analyst Profiles & Research Firms

Most relevant for enterprise technology companies and larger B2B organizations

- ☐ Gartner
- ☐ Forrester
- ☐ Everest Group

- ☐ IDC
- ☐ Omdia
- ☐ ISG



Employer & Recruiting Profiles

Increasingly cited in AI answers about company reputation

- ☐ Glassdoor
- ☐ Indeed
- ☐ Built In

- ☐ Wellfound (AngelList)
- ☐ Handshake
- ☐ Comparably

9 Owned Social & Content Channels

Brand-controlled channels that reinforce your company's identity

- ☐ LinkedIn
- ☐ YouTube
- ☐ X
- ☐ Instagram
- ☐ Facebook

- ☐ TikTok
- ☐ Threads
- ☐ Medium
- ☐ Substack

10 Community Platforms

Generally not directly editable, but useful to monitor because they influence LLMs

- ☐ Reddit
- ☐ Hacker News
- ☐ Stack Overflow
- ☐ Quora

- ☐ Product Hunt
- ☐ Industry forums
- ☐ Public Slack communities
- ☐ Discord communities

FINAL REVIEW

As you complete your audit, ask:

- ☐ Are our categories, positioning and primary use cases described consistently?
- ☐ Are product names, capabilities and messaging current?
- ☐ Are company statistics, funding, leadership and awards up to date?
- ☐ Have new directories or AI-visible platforms emerged since our last review?

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