AROBIS AI

FREE TEMPLATES PACK

SEO + AI Search Templates Pack

Five working templates for B2B SaaS teams who need to win Google and the AI engines their buyers now ask first. Each one is a fillable PDF plus a spreadsheet with live formulas.

01 **SEO + AI Search Checklist**
72 checks, scored per page

02 **Competitor Analysis Template**
SEO + AI search share of voice, 25 prompts x 5 engines

03 **SEO Audit Template with an AI Visibility Tab**
48 checks, 90-day plan

04 **AI-Ready Technical Kit**
JSON-LD + robots.txt for AI crawlers

05 **SEO Report Template with AI Search KPIs**
22 KPIs tied to pipeline

Fillable PDFs + spreadsheets with live formulas

Made by Arobis AI, arobis.ai

What is in this pack

Five templates, each with its own How to use page. The spreadsheet versions (.xlsx, Google Sheets ready) calculate scores, share of voice and month-over-month change for you.

	Template	What it answers	Page
01	**SEO + AI Search Checklist**	Is this page ready to rank in Google and be quoted by AI engines?	3
02	**Competitor Analysis Template: SEO + AI Search Share of Voice**	Why does AI recommend them and not us, on which prompts, in which engine?	23
03	**SEO Audit Template with an AI Visibility Tab**	What is broken site-wide, what do we fix first, and what is the 90-day plan?	42
04	**AI-Ready Technical Kit: JSON-LD Schema + robots.txt for AI Crawlers**	Can AI crawlers reach us, and do they understand our company and product?	62
05	**SEO Report Template with AI Search KPIs**	What moved this month in SEO and AI search, and what did it do for pipeline?	83

Which template to start with

Start with the one that answers the question you can't answer today. Your stage decides it.

1. **No SEO program yet.** Checklist on your 10 most important pages, then the technical kit.
2. **Ranking, but rarely named by AI.** Competitor template, then the audit. The citation sources tab shows where the shortlist gets made.
3. **Reporting to a CEO or board.** Report template first, then backfill the data.

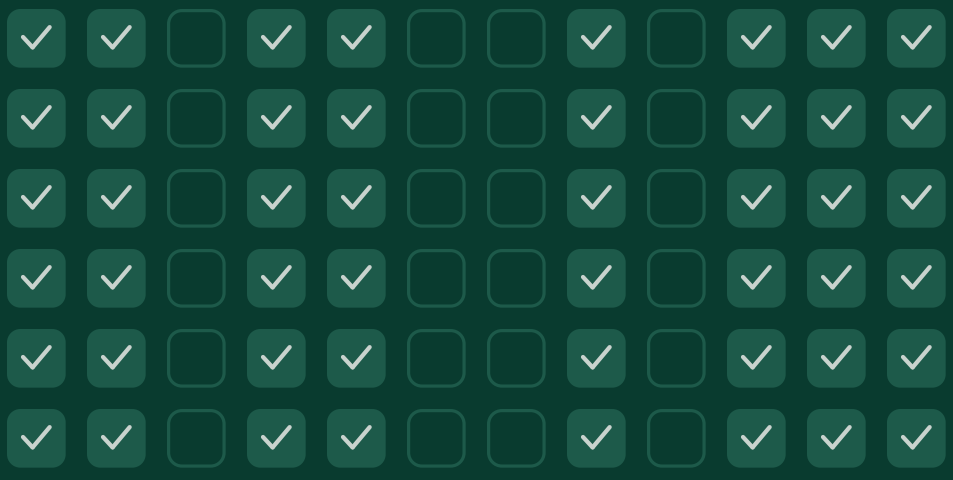
Whatever your stage, record the report baseline in month one.

AROBIS AI

SEO + AI Search Checklist

BUILT FOR B2B SAAS PAGES

72 checks for B2B SaaS pages, scored 0 to 100 per page, with the AI search layer the classic checklists skip.





TECHNICAL 17 ON-PAGE 14 CONTENT 14 OFF-PAGE 10 AI SEARCH LAYER 17

Fillable PDF + Excel version (opens in Google Sheets) with live page and site scores

Made by Arobis AI, arobis.ai

How to use this template

A scored sign-off checklist for B2B SaaS pages, for content leads and SEO managers who approve pages before they ship: 72 checks in five sections, each with why it matters, where to look, what good looks like and how to fix it. The last section covers what most SEO checklists skip: AI crawlers, entities, citations and AI referral tracking.

1. **Score up to five pages at once** Type up to five page URLs on the Score tab. Each section tab has a status column per page. Pick Done, Partly, Not yet or N/A from the dropdown. Score = weighted points earned divided by weighted points possible, times 100. Done = full points, Partly = half, Not yet = zero, N/A and blank are left out.
2. **Before you score** Search Console verified, GA4 recording, and Search Console > Security and manual actions > Manual actions empty. These sit outside the score: if one fails, fix it before anything else.
3. **Weights** 3 = moves rankings or AI answers on its own. 2 = clear effect. 1 = hygiene. Change a weight if your site is different, the scores update.
4. **Site vs Page checks** Scope 'Site' means the answer is the same for every page (robots.txt, G2 profile). Fill it once and copy it across the row. The Score tab shows a Page score (only the page-level checks, where pages differ) and a Site score (the site-wide checks) next to the overall score.
5. **N/A means cannot apply** Use N/A only when a check cannot apply to this page or site (hreflang on a one-language site). Never use it to skip a hard check: N/A drops out of the score.
6. **Score colours** Scores of 80 and above show in bold forest, 50 to 79 on butter, below 50 on pink haze. 'Critical gaps' counts weight-3 checks marked Not yet: fix those first.
7. **Sample data** Page 1 is filled in as a sample (butter cells). Overwrite it or clear it before you start.
8. **Go deeper** For answer engine work, read the AEO checklist at arobis.ai/blog/aeo-checklist. To see how ready your site is to be read and cited by AI engines, run the free AI Visibility Checker (a 0 to 100 score in about 25 seconds, no signup): arobis.ai/ai-visibility-checker.

In the spreadsheet

Score type up to 5 URLs: section, page, site and overall scores in forest, butter or pink.
Technical, On-page, Content, Off-page, AI search layer one tab per section, a status dropdown per page.
Weights editable per check, the scores follow.

In this PDF

Fillable: type into any box, click a circle or tick box, then save. Works in Acrobat, Preview, Chrome and Edge.
Printable: Letter size, portrait, clean margins. One copy = one page. Duplicate the file for each URL you check.

This copy is for

PAGE URL	OWNER	REVIEWED ON

Technical

17 CHECKS, 40 POINTS

Can Google, Bing and the AI crawlers reach, render and index the page?

T01 Page returns 200 and is indexable

WHY A money page that is not indexed cannot rank or be cited, and noindex tags left over from staging are a common cause.
CHECK Google Search Console > URL Inspection (paste the URL). Bulk: Screaming Frog > Internal > Indexability column.
GOOD Status 200, 'URL is on Google', no noindex in the meta robots tag or the X-Robots-Tag header.
FIX Remove the noindex (Webflow: Page settings > SEO; WordPress: Yoast > Advanced), then click Request indexing.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T02 Canonical points to itself, and Google agrees

WHY If Google picks a different canonical, the page you optimize is not the page that ranks.
CHECK Search Console > URL Inspection > Page indexing > 'User-declared canonical' vs 'Google-selected canonical'.
GOOD One rel=canonical tag, absolute https URL, both canonicals identical.
FIX Set the canonical in the CMS and delete duplicates added by plugins or the theme. Merge near-duplicate pages.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T03 One host, one protocol, one hop

WHY Split signals across http, https, www and non-www dilute links and confuse crawlers.
CHECK Terminal: curl -I http://yoursite.com, http://www.yoursite.com, https://www.yoursite.com
GOOD Every variant returns one 301 straight to the preferred https host. No chains.
FIX Set a single redirect rule at the CDN or host (Cloudflare > Rules > Redirect Rules, or the Webflow default domain setting).

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T04 Docs, help center and app sit on a clear domain plan

WHY Buyers ask AI 'does X integrate with Y' and the answer usually comes from docs or help pages. If those are blocked or unlinked, the engine guesses.
CHECK List every subdomain (docs., help., app., status.). Search Console > add a Domain property so all of them report together.
GOOD Docs and help center indexable and linked from the footer. App login and in-app pages set to noindex.
FIX Add the Domain property, link docs from the footer, noindex the app shell, keep docs out of robots.txt Disallow rules.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T05 XML sitemap lists only canonical, indexable, 200 URLs

WHY A dirty sitemap wastes crawl on junk and tells Google you do not know which pages matter.
CHECK Search Console > Indexing > Sitemaps. Screaming Frog > Mode > List > Download XML Sitemap, then crawl it.
GOOD Status 'Success'. Zero redirected, noindex or 404 URLs inside. lastmod changes only when content changes.
FIX Exclude tag, author, thank-you and paginated archive pages. Regenerate and resubmit.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

T06 No money page sits in 'not indexed'

WHY Pricing, integration and comparison pages stuck in 'Crawled, currently not indexed' are invisible to every engine that leans on Google or Bing results.
CHECK Search Console > Indexing > Pages > 'Why pages aren't indexed'. Filter by /pricing, /integrations, /compare, /alternatives.
GOOD Zero money pages under 'Crawled, currently not indexed' or 'Discovered, currently not indexed'.
FIX Add internal links from the nav and hub pages, make the copy unique (not a template swap), then request indexing.

SITE-WIDE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

T07 Core Web Vitals pass on mobile

WHY Slow pages lose the click even when they rank, and page experience is part of how Google ranks.
CHECK pagespeed.web.dev (field data, Mobile tab) or Search Console > Experience > Core Web Vitals.
GOOD LCP 2.5 s or less, INP 200 ms or less, CLS 0.1 or less at the 75th percentile (thresholds: web.dev/articles/vitals).
FIX Serve the hero as WebP, set width and height on images, delay chat widgets and tag managers until after load.

THIS PAGE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

T08 Body copy is in the raw HTML, not only rendered by JavaScript

WHY OpenAI's and Anthropic's crawlers fetch JavaScript files but do not execute them (Vercel study: vercel.com/blog/the-rise-of-the-ai-crawler). Googlebot renders, so Google may see text that ChatGPT and Claude never do.
CHECK View source (Ctrl+U or Cmd+Option+U) and search for a sentence from the middle of the page. Or: curl -s URL | grep 'your sentence'.
GOOD Headings, body copy, plan names, prices and FAQ answers are all present in the HTML source.
FIX Use server-side or static rendering (Next.js SSG/SSR, Webflow native). Do not load tab content or pricing from an API on click.

THIS PAGE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

T09 Pricing plans are readable text, not an image or a calculator only

WHY 'How much does X cost' is a prompt every buyer types. Engines quote what they can read, or they quote a three-year-old review.
CHECK View source of /pricing. Search for each plan name and its price or 'Contact sales'.
GOOD Plan names, prices or pricing logic, limits and what each plan includes are plain HTML text.
FIX Render plan cards as HTML. If you use a calculator, add a text summary of the pricing model under it.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T10 No orphan money pages

WHY In a published Arobis AI case, 31 of 84 posts had zero internal links. Fixing internal links alone, with no new posts, took organic sessions up 128% by day 35.
CHECK Screaming Frog with Search Console and sitemap connected > Crawl Analysis > Orphan URLs. Free option: Ahrefs Webmaster Tools > Site Audit > Links.
GOOD Every pricing, integration, comparison, alternatives and use-case page has 3 or more links from crawlable pages (Arobis AI house rule).
FIX Build hub pages (/integrations, /compare), add contextual links from relevant blog posts, link hubs from the footer.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T11 Internal links do not hit 404s or redirect chains

WHY Broken links waste crawl and leak the authority you worked to earn.
CHECK Screaming Frog > Response Codes > Client Error (4xx) and Redirection (3xx) > Bulk Export > Inlinks.
GOOD Zero internal links to 404s. Internal links point straight at the final URL.
FIX Update the links in the CMS. 301 retired pages to the closest live equivalent.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T12 Every retired or renamed URL has a 301 that is applied and tested

WHY A planned 301 that never got applied cost a B2B services company its rankings for that topic: position 11.5 fell to 95. Planned is not done.
CHECK Keep a redirect sheet (old URL, new URL). Test each: curl -I old-url. Search Console > Indexing > Pages > Not found (404).
GOOD Every old URL returns 301 to its new URL in one hop. No rising 404 count.
FIX Apply the missing redirects, then log every planned redirect in a ledger with an automated check.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T13 robots.txt does not block money paths or assets

WHY One stray Disallow line can hide /pricing or the CSS that Google needs to render the page.
CHECK yoursite.com/robots.txt. Search Console > Settings > robots.txt report.
GOOD No Disallow on /pricing, /integrations, /blog, /docs or asset folders (/_next/, /static/). A Sitemap: line is present.
FIX Edit robots.txt (start from the AI-Ready Technical Kit in this pack) and re-check the report.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T14 Changelog and release notes are crawlable

WHY 'Does X have feature Y' gets answered from release notes. Dated, specific release notes are proof an engine can quote.
CHECK Open /changelog or /release-notes. View source. Check it is linked from the footer.
GOOD Each release has its own URL or anchor, HTML text, a visible release date and a link from the footer.
FIX Move release notes out of in-app widgets onto a public page, one entry per release.

SITE-WIDE WEIGHT ●○○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T15 hreflang is correct (only if you have localized pages)

WHY Wrong hreflang sends US buyers to the UK pricing page in another currency.
CHECK Screaming Frog > Hreflang tab (enable in Configuration > Crawl).
GOOD Reciprocal tags on every language version, a self-reference and an x-default. Mark N/A if you have one language.
FIX Fix tags in the CMS localization settings, one set per page.

SITE-WIDE WEIGHT ●○○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T16 Mobile layout has no sideways scroll

WHY Comparison and pricing tables that scroll sideways on a phone lose the reader at the decision point.
CHECK Chrome DevTools > device toolbar at 375 px. Scroll the whole page.
GOOD No horizontal scroll, tables stack into cards, tap targets about 44 px, body text 16 px.
FIX Stack tables into cards below 768 px, increase tap target padding.

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- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

T17 Site verified in Bing Webmaster Tools, money pages indexed in Bing

WHY Bing's index sits behind Copilot answers, and ChatGPT search has used Bing results. A money page Bing has not indexed is missing from those answers.
CHECK bing.com/webmasters > URL Inspection (paste each money page) and > Sitemaps.
GOOD Site verified, sitemap processed, every money page shows 'Indexed successfully'.
FIX Import the site from Search Console in Bing Webmaster Tools, submit the sitemap, turn on IndexNow (Cloudflare > Caching > Configuration > Crawler Hints, or your CMS plugin).

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

On-page

14 CHECKS, 26 POINTS

Does the page say clearly, in its first lines, what it is and who it is for?

001 Title tag leads with the term the page should own

WHY The title is still the strongest on-page signal and the first thing a searcher reads.
CHECK View source > <title>, or Screaming Frog > Page Titles. Compare with the term in your keyword map.
GOOD Primary term in the first five words, unique across the site, under about 60 characters, brand last. Example: 'Product Analytics for B2B SaaS Teams | Brand'.
FIX Edit the SEO title field in the CMS (not the H1). Check Search Console Queries for the wording buyers use.

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- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

002 One H1 that matches the search intent

WHY Two H1s or an H1 like 'Welcome' wastes the clearest heading signal you have.
CHECK Screaming Frog > H1 tab (Missing, Multiple). Or the Detailed SEO Extension in Chrome.
GOOD Exactly one H1, contains the term in natural wording, promises what the title promises.
FIX Change the hero heading element to H1 and demote other H1s to H2.

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- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

003 Meta description earns the click

WHY Google rewrites many descriptions, but a specific one still lifts click-through when it is shown.
CHECK Screaming Frog > Meta Description tab. Search Console > Performance > Pages > CTR for this URL.
GOOD Unique, 140 to 160 characters (house rule), says who it is for, one proof point and the next step.
FIX Rewrite with the buyer's problem first and a concrete outcome. No 'Learn more about our solution'.

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- ○ Partly
- ○ Not yet
- ○ N/A

004 The first two sentences answer the main question

WHY AI engines and featured snippets lift short, self-contained answers. A slow intro gives them nothing to quote.
CHECK Read the first 100 words out loud.
GOOD Sentence one defines or answers (what it is, who it is for, the category). No scene-setting intro.
FIX Rewrite the opening as a direct answer, then expand. Keep the term in the first 100 words.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

005 H2s use the words buyers actually type

WHY Headings that mirror real queries win long-tail clicks and map to the prompts people paste into ChatGPT.
CHECK Search Console > Performance > filter Page = this URL > Queries. Also People Also Ask for the main term.
GOOD At least half the H2s reuse real query wording from Search Console or People Also Ask.
FIX Rename H2s to the query wording. Add an H2 for each high-impression query the page does not answer yet.

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- ○ Not yet
- ○ N/A

006 Every section opens with a sentence that stands alone

WHY Engines split pages into passages. A passage that starts with 'As mentioned above' cannot be quoted.
CHECK Read only the first sentence under each H2.
GOOD Each first sentence makes sense if quoted alone and names the subject (not 'This' or 'It').
FIX Rewrite each opener to restate the subject and give the answer.

THIS PAGE WEIGHT ●●○

- ○ Done
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- ○ Not yet
- ○ N/A

007 Out-links: three or more contextual links to related money pages

WHY Internal links tell Google which pages matter and walk the reader toward pricing and demo.
CHECK Screaming Frog > select URL > Outlinks tab (filter Hyperlink, internal).
GOOD 3 or more in-body links to related pages, descriptive anchors, one link per destination.
FIX Add links where the text already mentions the topic of the target page.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

008 In-links: five or more with varied, descriptive anchors

WHY Pages with few internal links get crawled less and rank lower than their content deserves.
CHECK Screaming Frog > select URL > Inlinks. Search Console > Links > Internal links > Top linked pages.
GOOD 5 or more internal links in (house rule for money pages), anchors describe the page, no 'click here'.
FIX Add links from the top traffic blog posts and from hub pages.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

009 URL slug is short, readable and stable

WHY Every slug change needs a redirect, and long slugs with dates force rework.
CHECK Read the URL.
GOOD Patterns like /integrations/salesforce, /compare/brand-vs-rival, /pricing. No dates, IDs or stop words.
FIX Change only if clearly broken, and only with a tested 301 (see T12).

THIS PAGE WEIGHT ●○○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

010 Images have alt text, modern formats and set dimensions

WHY Alt text is how crawlers read screenshots, and missing dimensions cause layout shift.
CHECK Screaming Frog > Images > Missing Alt Text. Lighthouse > 'Serve images in next-gen formats'.
GOOD Descriptive alt on every meaningful image, WebP or AVIF in the page, width and height set.
FIX Add alt text that says what the screenshot shows, re-export as WebP, set dimensions.

THIS PAGE WEIGHT ●○○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

011 Product screenshots have captions in text

WHY A screenshot of your dashboard says nothing to a crawler. The caption does.
CHECK Look under each product screenshot.
GOOD Each screenshot has a one-line caption saying what it shows and why it matters.
FIX Add figcaption text, for example 'Retention report filtered by plan, showing week-4 drop-off'.

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- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

012 Comparison and pricing tables are HTML, not images

WHY Engines answer 'X vs Y' prompts from tables they can parse.
CHECK View source and look for <table> or list markup holding the comparison.
GOOD Every comparison row is text in the HTML and stacks cleanly on a phone.
FIX Rebuild image tables as HTML tables or lists.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

013 Open Graph image and tags set

WHY Links shared in Slack, LinkedIn and email look broken without them, and that is where B2B buyers share pages.
CHECK opengraph.xyz or view source for og:title, og:description, og:image.
GOOD All three set, og:image 1200 x 630 in PNG, JPG or WebP.
FIX Set the social fields in the CMS. Avoid AVIF for og:image, some previewers cannot read it.

THIS PAGE WEIGHT ●○○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

O14 One clear next step that fits the stage

WHY A how-to post with only 'Book a demo' converts worse than one that offers the next useful step.
CHECK Look above the fold on a phone.
GOOD Bottom-of-funnel pages: demo or trial. Top-of-funnel: a template, tool or checker, then demo.
FIX Match the CTA to the intent of the query that brings people in.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

Content

14 CHECKS, 34 POINTS

Is this the best page on the internet for its query, and does it say something only you can say?

C01 The page owns one primary keyword no other page targets

WHY Two of your pages competing for one term usually means neither wins.
CHECK Search Console > Performance > filter Query = the term > Pages tab.
GOOD One URL gets the clear majority of impressions for its term.
FIX Merge the weaker page into the stronger one with a 301, or re-target it to a different term.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C02 A named author with a real bio

WHY Google's quality guidelines ask who wrote it and why they are qualified. Anonymous pages lose that test.
CHECK Look for the byline, author page and LinkedIn link.
GOOD Byline links to an author page with role, experience and LinkedIn. Person schema on the author page.
FIX Create author pages for everyone who writes, link the byline, add Person schema.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C03 At least one thing only your company can say

WHY A page that repeats page one gives Google no reason to rank it and AI engines nothing new to cite.
CHECK Find the first-party element: your data, a screenshot from your product, a workflow from a customer, a test you ran.
GOOD At least one original chart, number, screenshot or workflow per page (house rule).
FIX Pull one metric or before-and-after from your own product or a customer (with permission) and build the section around it.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C04 Every statistic links to its primary source

WHY Unsourced numbers are a trust problem for readers, for Google raters and for engines choosing what to cite.
CHECK Click every number on the page.
GOOD Each stat links to the original study, not a blog that quoted it. No invented numbers.
FIX Replace secondhand links with the primary source or cut the stat.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C05 Pricing page answers the buyer's real questions

WHY When the pricing page is vague, AI engines answer pricing prompts from G2 reviews and old forum threads instead.
CHECK Run the prompt 'How much does [your brand] cost?' in ChatGPT and Perplexity and compare the answer to your page.
GOOD Plain answers to: what each plan includes, usage limits, overage, annual vs monthly, contract length, trial, who each plan is for.
FIX Add a pricing FAQ that answers each point in one or two sentences.

THIS PAGE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C06 Comparison pages exist for your top 3 to 5 rivals, and they are fair

WHY 'X vs Y' prompts are where shortlists get made. One-sided pages read as ads and rarely get cited.
CHECK Search 'yourbrand vs rival' in Google and ChatGPT. Check /compare on your site.
GOOD One page per main rival, sourced feature rows, says plainly where the rival is the better fit.
FIX Build /compare/brand-vs-rival pages from sales call notes. Re-check rival pricing every quarter.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C07 Alternatives pages for your top rivals

WHY '[Rival] alternatives' is typed by buyers who are already unhappy with a competitor.
CHECK Search '[rival] alternatives' and see who ranks and who AI names.
GOOD A page per top rival listing you plus honest other options, with who each one fits.
FIX Write /alternatives/rival pages. Lead with the switching reasons your sales team hears.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C08 One page per major integration

WHY 'Does X integrate with Salesforce' is answered from integration pages. A logo wall answers nothing.
CHECK Open /integrations. Count integrations that have their own URL.
GOOD Each top 10 integration has its own indexable page: what syncs, which direction, setup steps, limits, screenshots.
FIX Turn the logo wall into a hub with a page per integration. Start with the 10 your customers use most.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C09 Use-case and role pages for the people who buy

WHY Buyers ask for 'X for [their role or job]'. Pages that name the job get matched to those prompts.
CHECK List your top 3 buyer roles and top 5 jobs to be done. Check each has a page.
GOOD A page per main role or use case, written with that role's words and metrics.
FIX Build the pages from closed-won call notes.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C10 Security and trust page answers procurement

WHY Security prompts ('Is X SOC 2 compliant?') decide enterprise shortlists, and engines quote trust pages.
CHECK Open /security or /trust. Run 'Is [brand] SOC 2 compliant?' in ChatGPT.
GOOD Plain text on certifications (SOC 2, ISO 27001), data hosting regions, subprocessors, DPA, SSO and SCIM, status page link.
FIX Publish a trust page with one short answer per procurement question and a way to request reports.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C11 Facts, screenshots and prices are still true

WHY Old UI screenshots and last year's prices get repeated by engines long after you change them.
CHECK Search Console > Performance > compare last 3 months to the previous period > Pages losing clicks. Then read them.
GOOD No outdated prices, plan names or UI. The updated date changes only when the content really changes.
FIX Refresh the facts, swap screenshots, then update the date.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C12 Format matches what already ranks

WHY If the top five results are templates and you wrote an essay, you are fighting the intent.
CHECK Google the term in an incognito window. Note the format of the top 5 (list, guide, tool, template, comparison).
GOOD Your page uses the winning format and adds something the top 5 lack.
FIX Restructure to the winning format before adding more words.

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C13 FAQ built from real sales objections

WHY Sales calls hold the exact questions buyers also type into AI. Generic FAQs answer nobody.
CHECK Pull the top 10 objections from call recordings or the CRM lost-reason field.
GOOD 4 to 8 questions in the buyer's wording, each answered in 40 to 80 words (house rule).
FIX Rewrite the FAQ from call notes. Mark it up with FAQPage schema (see the kit).

THIS PAGE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

C14 Case studies carry numbers and a named role

WHY Proof with a metric and a job title is what both buyers and engines repeat.
CHECK Open your case studies.
GOOD Each has a before and after metric, timeframe and the customer's role (named with permission).
FIX Rewrite the top three with the metric in the title and the first sentence.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

Off-page

10 CHECKS, 19 POINTS

Do other sites, reviews and communities vouch for you where buyers and engines look?

F01 Money pages earn external links, not just the homepage

WHY Links pointing only at the homepage do little for the pricing or comparison page you want ranked.
CHECK Ahrefs Webmaster Tools (free for verified sites) > Site Explorer > Best by links. Search Console > Links > Top linked pages.
GOOD Pricing, comparison, integration and tool pages each have external referring domains.
FIX Pitch data and tools (they earn links), then link from them to money pages.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F02 You appear in the 'best [category]' lists that rank and get cited

WHY AI answers for 'best X' prompts lean on the listicles that rank. If you are not in them, you are rarely in the answer.
CHECK Google 'best [category]' in incognito. In Perplexity open the Sources tab; in ChatGPT click the citations.
GOOD Listed on the top-10 listicles you can realistically reach. Set your own target, then track it monthly.
FIX Send each list owner a short, factual update with a reason to include you. Track every ask.

SITE-WIDE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F03 G2 profile complete and getting fresh reviews

WHY G2 pages rank for 'best X' and 'X alternatives' and get cited in AI answers about software.
CHECK G2 seller portal (my.g2.com) > Profile and Reviews.
GOOD Correct primary category, screenshots, pricing, recent reviews. Set your own review target.
FIX Ask happy customers after a success moment (renewal, milestone), not in a blast.

SITE-WIDE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F04 Capterra, GetApp and Software Advice profiles complete

WHY These Gartner Digital Markets sites rank for category terms and feed comparison answers.
CHECK vendors.capterra.com > your listing.
GOOD Category, pricing, screenshots and reviews filled in and current.
FIX Complete the profile and route part of your review asks here.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F05 Real presence in Reddit and communities

WHY Reddit threads rank for buyer questions and show up in AI answers. Fake accounts get banned and remembered.
CHECK Google: site:reddit.com '[category]' and 'yourbrand'. Read the threads.
GOOD Named staff answer questions honestly in relevant subreddits and follow each sub's rules.
FIX Pick 3 subreddits, read the rules, join, answer questions with no link for the first weeks.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F06 Listed in integration marketplaces

WHY Marketplace listings (Salesforce AppExchange, HubSpot App Marketplace, Slack, Zapier) are trusted pages that confirm the integration exists.
CHECK Search each marketplace for your brand.
GOOD A listing for every integration you support, linking to your integration page.
FIX Submit listings, starting with the platforms your customers use most.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F07 One consistent description of the company everywhere

WHY Engines build their picture of you from many profiles. Five different descriptions blur the entity.
CHECK Compare your one-liner on the homepage, LinkedIn, Crunchbase, G2 and directories.
GOOD Same name, same category, same one-line description, same founding facts.
FIX Write one canonical description and paste it everywhere.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F08 Unlinked brand mentions turned into links

WHY Sites that already mention you are the easiest links you will ever get.
CHECK Google: "yourbrand" -site:yourdomain.com (last year). Google Alerts for the brand name.
GOOD Recent mentions checked and the right ones asked for a link.
FIX Short email: thanks for the mention, here is the page it refers to.

SITE-WIDE WEIGHT ●○○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F09 Anchor text looks natural

WHY A wall of identical exact-match anchors is a spam pattern.
CHECK Ahrefs Webmaster Tools > Site Explorer > Anchors.
GOOD Brand and URL anchors dominate, no single commercial phrase repeated across many sites.
FIX Vary anchors in new placements, mostly brand and partial match.

SITE-WIDE WEIGHT ●○○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

F10 Video demos and how-tos on YouTube with chapters

WHY Google shows YouTube results for how-to queries, and a transcript gives the video text to rank on.
CHECK Search YouTube and Google Video for '[category] tutorial' and your brand.
GOOD Demo and how-to videos with chapters, a clear title and a link to the matching page.
FIX Record screen demos of your top 5 jobs to be done and add chapters.

SITE-WIDE WEIGHT ●○○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

AI search layer

17 CHECKS, 38 POINTS

Can AI engines read you, do they know who you are, and do you know when they send buyers?

A01 AI search crawlers are allowed in robots.txt and at the CDN

WHY OpenAI says sites that opt out of OAI-SearchBot will not be shown in ChatGPT search answers (developers.openai.com/api/docs/bots).
CHECK yoursite.com/robots.txt. Then your CDN: Cloudflare > Security > Settings, filter Bot traffic > AI Crawler and Agent access policies (check Search and Agent are allowed), plus any custom WAF rules. Check it even if you never changed it.
GOOD OAI-SearchBot, Claude-SearchBot, PerplexityBot, Googlebot and Bingbot are not disallowed and not blocked at the CDN.
FIX Use the 'allow AI search' robots.txt in the kit. Turn off CDN rules that block these user agents.

SITE-WIDE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A02 Training crawlers are a decision, not an accident

WHY GPTBot, ClaudeBot, Google-Extended, Applebot-Extended, CCBot and meta-externalagent relate to model training. Google says Google-Extended does not affect inclusion in Google Search.
CHECK Read robots.txt line by line against the crawler matrix in the kit.
GOOD A written decision (allow or block training) and robots.txt matches it.
FIX Pick variant A or B from the kit and note the decision in your SEO doc.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A03 Server logs show AI bots getting 200s

WHY robots.txt can say allow while a firewall returns 403. Only logs show what bots actually get.
CHECK Cloudflare > AI Crawl Control (requests and allowed or blocked per AI crawler), or host logs (Vercel, Netlify) filtered by user agent: GPTBot, OAI-SearchBot, ClaudeBot, PerplexityBot.
GOOD Hits from those bots return 200 on your money pages, not 403 or 429.
FIX Allow-list verified bot IP ranges published by each vendor, relax rate limits for them.

SITE-WIDE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A04 Organization schema with sameAs on the homepage

WHY sameAs links tie your site to LinkedIn, Crunchbase, G2 and Wikidata so engines treat them as one entity.
CHECK validator.schema.org (paste the URL). Google Rich Results Test for errors.
GOOD Valid Organization with name, url, logo, description and sameAs to 4 or more official profiles.
FIX Paste the Organization JSON-LD from the kit, fill your profiles.

SITE-WIDE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A05 SoftwareApplication schema on the product or pricing page

WHY Google requires name, offers.price and aggregateRating or review for software app rich results (developers.google.com/search/docs/appearance/structured-data/software-app).
CHECK Rich Results Test on /pricing or the product page.
GOOD Valid, prices match the page, ratings only if those reviews are visible on the page.
FIX Use the SoftwareApplication JSON-LD from the kit.

THIS PAGE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A06 BlogPosting schema with a real author

WHY Author Person markup (name, jobTitle, sameAs) connects posts to a real expert.
CHECK validator.schema.org on a blog post.
GOOD BlogPosting with headline, datePublished, dateModified, author Person with url and sameAs.
FIX Add it to the blog template once, mapped to CMS fields.

THIS PAGE WEIGHT ●●○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A07 BreadcrumbList on deep pages

WHY Breadcrumbs show where a page sits (Integrations > Salesforce) for Google and engines.
CHECK Rich Results Test.
GOOD Valid BreadcrumbList that matches the visible breadcrumb.
FIX Add the BreadcrumbList JSON-LD from the kit to templates.

THIS PAGE WEIGHT ●○○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A08 AI engines describe you correctly

WHY If ChatGPT calls you a tool for the wrong buyer, you lose prompts you should win.
CHECK Ask ChatGPT, Perplexity and Gemini: 'What is [brand] and who is it for?' Compare with your positioning line.
GOOD Engines name your category and ICP, no wrong facts (old pricing, wrong product, wrong HQ).
FIX Fix the source: About page, Organization schema, LinkedIn, G2, Crunchbase. Re-check monthly.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A09 Money prompts tracked monthly across engines

WHY You cannot improve what you do not measure. A B2B SaaS client went from 5 of 25 money prompts naming it to 19 of 25 in 90 days, and that was measurable only because the baseline was recorded.
CHECK Use the Competitor Analysis template in this pack: 25 buyer prompts x ChatGPT, Gemini, Perplexity, AI Overviews, Copilot. For the mention-rate KPI use the 3-run AI prompt test in the SEO Audit template.
GOOD Baseline recorded, re-run monthly, same wording every time.
FIX Run the prompt set this week. Record mention, position and cited URLs.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A10 Your site gets cited, not only your name mentioned

WHY A citation sends clicks and tells the engine your page is the source. The same B2B SaaS client reached 45% of tracked AI answers citing its website.
CHECK In each answer, open the citations or sources and note whether your domain is there.
GOOD You track the share of answers citing your domain each month. Set your own target.
FIX Build the answer pages (pricing, comparison, integration) that engines cite for those prompts.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A11 You know which third-party pages AI cites, and you are in them

WHY Most cited pages for 'best X' prompts are lists, reviews and forums you do not own.
CHECK Collect cited URLs from your prompt runs (Competitor template, Citation sources tab).
GOOD You are mentioned on the most-cited third-party pages for your prompts.
FIX Pitch, review or contribute to each cited page, top citations first.

SITE-WIDE WEIGHT ●●●

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A12 GA4 shows AI visits as their own channel

WHY Since May 13, 2026 GA4's default channel group has an AI Assistant channel for recognized assistants. AI Overviews and AI Mode stay in Organic Search, and assistants GA4 does not recognize still land in Referral.
CHECK GA4 > Reports > Acquisition > Traffic acquisition, Session default channel group: look for the AI Assistant row. Optional: a custom 'AI engines' channel (regex in the Report template) to catch assistants the default misses, such as Perplexity if your property files it under Referral.
GOOD AI-referred sessions and key events visible by month and by engine, with no recognized assistant left in Referral.
FIX Review the AI Assistant row monthly. If an assistant your buyers use shows under Referral, add the custom channel above Referral and save a Free form exploration by session source.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A13 AI-sourced leads captured in the CRM

WHY GA4 sees sessions. Pipeline lives in the CRM. A B2B SaaS client tracked +31% qualified pipeline from AI engines this way.
CHECK Check your demo form for a 'How did you hear about us?' field and a hidden first-touch source field.
GOOD Free-text or picklist option for ChatGPT or another AI assistant, plus first-touch source stored on the contact.
FIX Add both fields to every demo and trial form, report monthly.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A14 Key facts stated in one quotable sentence each

WHY Engines quote one sentence. If your pricing model, ICP or security status needs three paragraphs, they quote someone else.
CHECK Search your site for one sentence each on: who it is for, pricing model, top integrations, security status.
GOOD Each fact exists as a single clear sentence on the page that owns it.
FIX Add a short 'At a glance' block to the homepage, pricing and trust pages.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A15 Wrong AI answers about you are logged and fixed at the source

WHY Engines repeat stale facts until the sources change.
CHECK Keep a log from your monthly prompt runs: wrong claim, engine, cited source.
GOOD Every wrong claim has an owner and a source page or profile fixed.
FIX Fix your page, then ask the third-party source to update.

SITE-WIDE WEIGHT ●●○

- ○ Done
- ○ Partly
- ○ Not yet
- ○ N/A

A16 llms.txt published (optional extra)

WHY No major engine has documented using it for ranking, so treat it as a cheap extra, not a lever.
CHECK Open yoursite.com/llms.txt.
GOOD A short file listing your key pages, or a conscious decision to skip it.
FIX Generate one free at arobis.ai/llms-txt-generator.

SITE-WIDE WEIGHT ●○○

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

A17 Answer pages cover your full prompt set

WHY Each money prompt needs a page that answers it. Missing pages are missing answers.
CHECK Map each of your 25 prompts to the URL that answers it.
GOOD Every prompt maps to one page that answers it in the first lines.
FIX Build the missing pages, highest-stage prompts first (pricing, comparison, alternatives).

SITE-WIDE WEIGHT ●●●

- ◯ Done
- ◯ Partly
- ◯ Not yet
- ◯ N/A

Sign-off before this page ships

APPROVED BY

DATE

WEIGHT-3 GAPS LEFT

OPEN ITEMS, OWNER AND DUE DATE

Score this page

Add the weight of every check marked Done, plus half the weight of every Partly. Divide by the points possible (max points minus the weight of checks marked N/A). Multiply by 100.

Section	Checks	Max points	N/A weight	Earned	Score
Technical	17	40			
On-page	14	26			
Content	14	34			
Off-page	10	19			
AI search layer	17	38			
Overall	72	157			

80 to 100	Good. Move on to the next page.
50 to 79	Work to do. Fix weight-3 checks first.
Below 50	Fix before you build more content on this page.

Critical gaps on this page (weight 3, marked Not yet)

Worked example: a weight-3 check marked Partly earns 1.5 of 3 points. Technical has 40 max points. With 3 points of N/A and 27.5 earned it scores 27.5 / 37 x 100 = 74.

Page score and Site score

The spreadsheet splits the overall score in two. Page score uses only the 31 checks marked THIS PAGE (65 max points), where pages differ. Site score uses the 41 SITE-WIDE checks (92 max points), the same for every page: answer them once. Same rule: earned / possible x 100.

PAGE: EARNED / POSSIBLE	PAGE SCORE	SITE: EARNED / POSSIBLE	SITE SCORE

Competitor Analysis Template

SEO + AI SEARCH SHARE OF VOICE

Who AI recommends instead of you, on which prompts, in which engine, and which pages it trusts to decide.

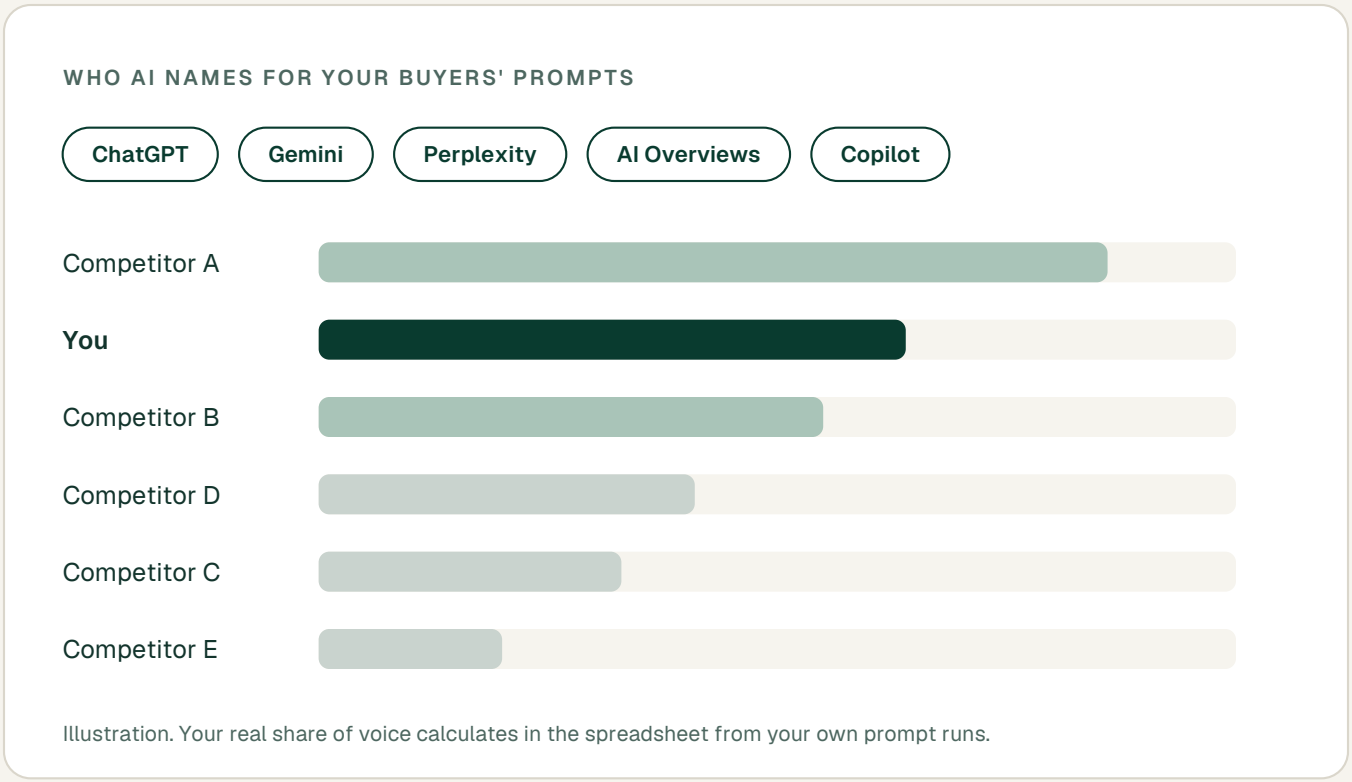


Illustration. Your real share of voice calculates in the spreadsheet from your own prompt runs.

How to use this template

A competitor analysis for B2B SaaS marketing teams that covers search and AI answers together. Classic templates compare features and pricing. This one also measures who AI engines recommend for your buyers' questions, how often, in which engine, and which pages they trust to decide, so you can answer the board question: why does ChatGPT recommend them and not us?

1. **Start on the Competitor set tab** Type your brand, up to five competitors and your category. Pick competitors from three places: who you lose deals to (CRM), who ranks top 3 for your head term, and who AI names when you ask 'best [category]'. They are often three different lists.
2. **Write your prompt set** The Prompts tab ships with 25 real buyer prompts for an example category (product analytics). Keep the stages, rewrite the wording in the 'Your wording' column using the words from your sales calls. On paper, read [your brand] and [Competitor A] as your own names.
3. **Run each prompt in five engines** ChatGPT (search on, Temporary chat), Gemini, Perplexity, Google AI Overviews (incognito, US) and Copilot. On the AI share of voice tab, type the position each brand appears in (1 = named first, blank = not named) and whether your site was cited. One run per engine is enough for share of voice; for the mention-rate KPI in your monthly report, use the 3-run AI prompt test in the SEO Audit template. If Google shows no AI Overview, leave that row blank: it is excluded. Optional: add Google AI Mode the same way (logged out, US).
4. **Read the results** The Share of voice tab calculates, per brand: mention rate, share of voice (its mentions divided by all brand mentions), first-place count and average position, then the same split by engine and by stage, with charts. Share of voice per engine shows where to focus: engines differ a lot.
5. **Then find why** Citation sources shows which pages engines lean on and who is in them. Reviews and community, Content gap and Positioning notes explain the rest. Every finding becomes a row on the Action list with impact, effort and an auto priority.
6. **Persona variants** Buyers paste context ('I am VP Product at a 200-person SaaS company…') and engines change the shortlist because of it. Three persona prompts sit under the main set as optional extra rows.
7. **Sample data** Butter cells are a filled, clearly labeled sample for a fictional product analytics company so you can see the whole template working. Overwrite them with your own data.

In the spreadsheet

Competitor set names typed once feed every tab.
Prompts 25 buyer prompts plus 3 persona variants.
AI share of voice one row per prompt and engine: positions and citations.
Share of voice calculated per brand, engine and stage, with charts.
Citation sources, Reviews, Content gap, Positioning, Action list the why, and what to do.

In this PDF

Fillable: type into any box, click a circle or tick box, then save. Works in Acrobat, Preview, Chrome and Edge.
Printable: Letter size, portrait, clean margins. Every grid starts with butter SAMPLE rows from a fictional company; the worked example closes the template.

Competitor set

Pick from three lists: who you lose deals to (CRM closed-lost), who ranks top 3 for your head term, and who AI names for 'best [category]'. They are rarely the same list.

YOUR CATEGORY, IN YOUR BUYERS' WORDS

	Brand / domain	One-line positioning	ICP / pricing model	Found via
SAMPLE **You**	**Your brand** yourbrand.example	Product analytics for B2B SaaS teams that live in the warehouse	Product and growth teams, 50 to 500 staff Per tracked user, annual	You
SAMPLE **Competitor A**	**Competitor A** competitor-a.example	All-in-one product analytics with session replay	PLG startups to mid-market Free tier, then per event	Named most often in AI answers
You				☐ CRM ☐ Google ☐ AI
Competitor A				☐ CRM ☐ Google ☐ AI
Competitor B				☐ CRM ☐ Google ☐ AI
Competitor C				☐ CRM ☐ Google ☐ AI
Competitor D				☐ CRM ☐ Google ☐ AI
Competitor E				☐ CRM ☐ Google ☐ AI

SEO snapshot

The classic SEO comparison, one row per metric, with the free source for each. Gap = best rival minus you (for the rank row, how many positions you trail). Re-count every quarter.

Metric	Where to get it	Sample: you	Sample: A	You	A	B	C	D	E	Gap
Domain Rating (DR)	Ahrefs free Website Authority Checker	41	72							
Referring domains	Ahrefs free Backlink Checker	1,200	9,800							
Est. monthly organic traffic	Ahrefs free Traffic Checker	18,000	210,000							
Keywords in top 10 (US)	Ahrefs or Semrush (paid): Organic keywords, positions 1 to 10. No paid tool? Leave blank and use the head-term rank row.	1,500	16,000							
Rank for head term	Incognito Google search, US location, logged out	9	1							
Comparison pages (count)	Two Google searches, then add the counts: site:domain.com inurl:vs and site:domain.com/compare	2	11							
Integration pages (count)	Google: site:domain.com/integrations	14	60							
Blog posts in last 90 days	Their /blog, or Google: site:domain.com/blog (Tools > Past 3 months)	6	24							
Branded search volume (US)	Google Keyword Planner, brand name, US, monthly average	1,900	22,000							

SAMPLE READING the fictional company trails Competitor A by 31 DR points and ranks #9 for its head term against #1. Read it next to share of voice: authority gaps explain part of who AI names.

25 buyer prompts

Real wording for an example category (product analytics). Keep the nine stages, rewrite each prompt with the words your buyers use on sales calls. [your brand], [Competitor A] and [Competitor B] are the names from your competitor set.

ID	Prompt	Your wording
PROBLEM Early research. The engine picks which categories and vendors to introduce.		
P01	Why do users sign up for our B2B SaaS trial and never come back?	
P02	How can I see which features our paying customers actually use?	
P03	What should a SaaS product team track to improve trial-to-paid conversion?	
CATEGORY The buyer is defining the category. Being the example here shapes the shortlist.		
P04	What is a product analytics platform and when does a B2B SaaS company need one?	
P05	Product analytics vs Google Analytics 4 for a SaaS app: what is the difference?	
P06	Should we buy a product analytics tool or build dashboards on our data warehouse?	
BEST X Shortlist prompts. Usually answered from listicles, G2 and Reddit.		
P07	What is the best product analytics platform for a B2B SaaS company with 50 employees?	
P08	Best product analytics software for product-led growth teams	
P09	Which product analytics tools are easiest to set up without an engineer?	
P10	Top product analytics platforms for enterprise SaaS with SSO and EU data hosting	
X VS Y Head-to-head. Answered from comparison pages, reviews and docs.		
P11	[your brand] vs [Competitor A] for product analytics: which should we choose?	
P12	[Competitor A] vs [Competitor B]: pros and cons for a mid-market SaaS company	
P13	Is [your brand] better than [Competitor A] for funnel and retention analysis?	
ALTERNATIVES Switching intent from a rival's unhappy customers.		
P14	What are the best alternatives to [Competitor A]?	

ID	Prompt	Your wording
P15	Cheaper alternatives to [Competitor B] for a startup	
P16	[Competitor A] alternatives that work directly on Snowflake	
PRICING Budget check. Answered from your pricing page or, if vague, from reviews.		
P17	How much does [your brand] cost per month?	
P18	Which product analytics tools have a free plan or usage-based pricing?	
P19	Is [Competitor A] worth the price for a 20-person SaaS team?	
INTEGRATIONS Fit check. Answered from integration pages, docs and marketplaces.		
P20	Which product analytics tools integrate with Salesforce and HubSpot?	
P21	Does [your brand] integrate with Snowflake and Segment?	
SECURITY Procurement check. Answered from trust pages and certifications.		
P22	Which product analytics platforms are SOC 2 Type II certified and GDPR compliant?	
P23	Is [your brand] safe to use with customer data, and does it offer EU data hosting?	
IMPLEMENTATION Risk check before signing. Answered from reviews, docs and case studies.		
P24	How long does it take to implement [your brand], and what do customers say about support?	
P25	Which product analytics vendors have the best G2 reviews from B2B SaaS teams?	

Persona variants (optional extra rows)

Buyers paste context, and engines change the shortlist because of it. Run these next to the main set to see the effect.

- I am VP Product at a 200-person B2B SaaS company on Snowflake. Which product analytics tools should we shortlist?
- I run growth at a 40-person PLG startup with no data engineer. What product analytics tool should we start with?
- I am a CTO at a 1,000-person SaaS company with EU customers. Which product analytics vendors meet SOC 2 and EU hosting needs?

AI share of voice: answer grid

One card per prompt. For each engine, tick every brand the answer names (You, Competitor A to E) and tick Cited if your site is linked. One run per engine is enough for share of voice. No AI Overview shown? Leave that engine blank.

P01 PROBLEM Why do users sign up for our B2B SaaS trial and never come back?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P02 PROBLEM How can I see which features our paying customers actually use?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P03 PROBLEM What should a SaaS product team track to improve trial-to-paid conversion?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P04 CATEGORY What is a product analytics platform and when does a B2B SaaS company need one?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P05 CATEGORY Product analytics vs Google Analytics 4 for a SaaS app: what is the difference?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P06 CATEGORY Should we buy a product analytics tool or build dashboards on our data warehouse?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐	Y ☐ A ☐ B ☐ C ☐ D ☐ E ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P07 **BEST X** What is the best product analytics platform for a B2B SaaS company with 50 employees?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P08 **BEST X** Best product analytics software for product-led growth teams

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P09 **BEST X** Which product analytics tools are easiest to set up without an engineer?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P10 **BEST X** Top product analytics platforms for enterprise SaaS with SSO and EU data hosting

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P11 **X VS Y** [your brand] vs [Competitor A] for product analytics: which should we choose?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P12 **X VS Y** [Competitor A] vs [Competitor B]: pros and cons for a mid-market SaaS company

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P13 **X VS Y** Is [your brand] better than [Competitor A] for funnel and retention analysis?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P14 **ALTERNATIVES** What are the best alternatives to [Competitor A]?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P15 **ALTERNATIVES** Cheaper alternatives to [Competitor B] for a startup

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P16 **ALTERNATIVES** [Competitor A] alternatives that work directly on Snowflake

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P17 **PRICING** How much does [your brand] cost per month?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P18 **PRICING** Which product analytics tools have a free plan or usage-based pricing?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P19 **PRICING** Is [Competitor A] worth the price for a 20-person SaaS team?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P20 **INTEGRATIONS** Which product analytics tools integrate with Salesforce and HubSpot?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P21 **INTEGRATIONS** Does [your brand] integrate with Snowflake and Segment?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P22 **SECURITY** Which product analytics platforms are SOC 2 Type II certified and GDPR compliant?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P23 **SECURITY** Is [your brand] safe to use with customer data, and does it offer EU data hosting?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P24 **IMPLEMENTATION** How long does it take to implement [your brand], and what do customers say about support?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

P25 **IMPLEMENTATION** Which product analytics vendors have the best G2 reviews from B2B SaaS teams?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

Persona variants (optional, not in the tally)

V1 **PERSONA** I am VP Product at a 200-person B2B SaaS company on Snowflake. Which product analytics tools should we shortlist?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

V2 **PERSONA** I run growth at a 40-person PLG startup with no data engineer. What product analytics tool should we start with?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

V3 **PERSONA** I am a CTO at a 1,000-person SaaS company with EU customers. Which product analytics vendors meet SOC 2 and EU hosting needs?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E	Y A B C D E
☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
☐ Cited	☐ Cited	☐ Cited	☐ Cited	☐ Cited

Share of voice tally

Count the ticks per brand per engine. Share of voice = a brand's mentions / all brand mentions. Mention rate = a brand's mentions / answers run (25 per engine). Where your share is lowest in an engine your buyers use, read what that engine cites (next page).

SAMPLE TALLY fictional brands, computed from the spreadsheet's sample grid

Brand	ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	Total	Share	Mention rate
Your brand	10	10	8	10	14	52	16%	42%
Competitor A	18	19	24	19	15	95	30%	76%
Competitor B	12	17	16	11	9	65	20%	52%
Competitor C	8	10	8	7	7	40	13%	32%
Competitor D	7	10	8	10	7	42	13%	34%
Competitor E	7	4	7	3	3	24	8%	19%

Your tally

Brand	ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	Total	Share	Mention rate
You								
Competitor A								
Competitor B								
Competitor C								
Competitor D								
Competitor E								
All brands							100%	

Citation sources

Which pages do engines cite for your prompts, and who is on them? Tick Y (you) and A to E for every brand the page names. Priority: a page cited often that names two or more competitors and not you.

Cited domain or URL	Type	Times	Y	A	B	C	D	E	Can we get in?	Next step
SAMPLE g2.com/categories/product-analytics	Review site	18	Y	Y	Y	Y	Y		Yes	Fill profile gaps, ask 10 customers for reviews after renewals
SAMPLE reddit.com/r/ProductManagement	Community	11		Y		Y			Yes	Named PM answers 2 threads a week, no links for the first month
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	
			☐	☐	☐	☐	☐	☐	○ Yes ○ No	

Reviews and community presence

Where buyers and engines check what real users say. Trends matter more than one month: re-count every quarter.

SAMPLE fictional company vs its main competitor: the gap on review volume and Reddit is what AI answers echo

Metric	Where to get it	You	Competitor A
G2 reviews (count)	g2.com product page, review count next to stars	86	1450
G2 rating (out of 5)	g2.com product page	4.5	4.6
G2 reviews last 90 days	g2.com > Reviews > sort by Most recent, count back 90 days	9	120
Capterra reviews (count)	capterra.com product page	40	520
Capterra rating (out of 5)	capterra.com product page	4.6	4.5
TrustRadius reviews (count)	trustradius.com product page	12	300
Reddit threads naming brand (last 12 months)	Google: site:reddit.com "brand" > Tools > Past year, count results on first 3 pages	6	85
YouTube videos about brand (third-party)	YouTube search "brand tutorial" and "brand review", count non-brand channels	4	60

Your numbers

Metric	You	A	B	C	D	E
G2 reviews (count)						
G2 rating (out of 5)						
G2 reviews last 90 days						
Capterra reviews (count)						
Capterra rating (out of 5)						
TrustRadius reviews (count)						
Reddit threads naming brand (last 12 months)						
YouTube videos about brand (third-party)						

Content gap: answer pages

Tick the page types each brand has. Build first where you have nothing and two or more competitors do: those pages are what engines cite for the matching prompts.

Page type	Prompts it answers	You	A	B	C	D	E	Gap
Pricing page with plan details in text	Pricing prompts	☐	☐	☐	☐	☐	☐	☐
Comparison page vs each top rival	X vs Y prompts	☐	☐	☐	☐	☐	☐	☐
Alternatives page for each top rival	Alternatives prompts	☐	☐	☐	☐	☐	☐	☐
Integrations hub with one page per integration	Integration prompts	☐	☐	☐	☐	☐	☐	☐
Security / trust page (SOC 2, DPA, hosting)	Security prompts	☐	☐	☐	☐	☐	☐	☐
Public docs and help center	Integration and implementation prompts	☐	☐	☐	☐	☐	☐	☐
Use-case pages by job to be done	Problem and Best X prompts	☐	☐	☐	☐	☐	☐	☐
Role pages (product manager, growth, data)	Best X prompts	☐	☐	☐	☐	☐	☐	☐
Free tool, template or calculator	Problem prompts, links	☐	☐	☐	☐	☐	☐	☐
Original research or benchmark report	Citations and links	☐	☐	☐	☐	☐	☐	☐
Case studies with metrics	Implementation prompts	☐	☐	☐	☐	☐	☐	☐
Migration guide from a named rival	Alternatives prompts	☐	☐	☐	☐	☐	☐	☐
Changelog / release notes	Feature prompts	☐	☐	☐	☐	☐	☐	☐
Glossary of category terms	Category prompts	☐	☐	☐	☐	☐	☐	☐

SAMPLE the rows where the fictional company has no page (Y = has it, N = does not)

Page type	You	A	B	C	D	E	Gap
Comparison page vs each top rival	N	Y	Y	N	Y	N	**Build it**
Alternatives page for each top rival	N	Y	N	N	Y	N	**Build it**
Use-case pages by job to be done	N	Y	Y	Y	N	N	**Build it**
Role pages (product manager, growth, data)	N	N	Y	N	N	N	**Consider**
Free tool, template or calculator	N	Y	N	Y	N	Y	**Build it**
Original research or benchmark report	N	Y	Y	N	N	N	**Build it**
Migration guide from a named rival	N	Y	N	N	N	N	**Consider**
Glossary of category terms	N	Y	Y	Y	N	N	**Build it**

SAMPLE READING the fictional company lacks comparison page vs each top rival, alternatives page for each top rival, use-case pages by job to be done, free tool, template or calculator, original research or benchmark report, glossary of category terms, while two or more competitors have them. Those are its first builds.

Positioning notes

What each brand claims and charges, what AI engines and reviews say back, a four-line SWOT, and your counter-position. Note the engine and prompt ID next to every AI quote.

	SAMPLE You	Competitor A
Homepage H1 (their claim)	Product analytics on your warehouse	See what users do, fix what they don't
Entry price	$400/mo, billed annually	$0, then from $49/mo
Free plan or trial	14-day trial	Free tier
Top 5 features	Warehouse sync, funnels, retention, cohorts, SQL export	Session replay, funnels, heatmaps, surveys, feature flags
Who AI says it is best for (paste from answers)	Data-mature B2B SaaS teams (Perplexity, P07)	Startups and PLG teams (ChatGPT, P08)
Proof they lead with	Customer logos, Snowflake partner badge	Free tier, session replay
Where reviews say they are weak	Setup needs a data engineer (G2)	Pricing jumps at scale (G2, Reddit)
Strengths	No data copy, works on Snowflake and BigQuery	Huge review base, free tier
Weaknesses	86 G2 reviews against 1,450 for Competitor A	Event pricing grows fast
Opportunities (for you)	Missing from 7 of the top-10 'best' listicles	Win teams it priced out at scale
Threats (to you)	Competitor A is named first in most ChatGPT answers	Adds a warehouse connector
Our counter-position	Own the 'no-copy, warehouse-native' angle with a migration guide	Price comparison page at 1M and 10M events

You

Homepage H1 (their claim)

Entry price

Free plan or trial

Top 5 features

Who AI says it is best for (paste from answers)

Proof they lead with

Where reviews say they are weak

Strengths

Weaknesses

Opportunities (for you)

Threats (to you)

Our counter-position

Competitor A

Homepage H1 (their claim)	Entry price	Free plan or trial
Top 5 features	**Who AI says it is best for (paste from answers)**	**Proof they lead with**
Where reviews say they are weak	**Strengths**	**Weaknesses**
Opportunities (for you)	**Threats (to you)**	**Our counter-position**

Competitor B

Homepage H1 (their claim)	Entry price	Free plan or trial
Top 5 features	**Who AI says it is best for (paste from answers)**	**Proof they lead with**
Where reviews say they are weak	**Strengths**	**Weaknesses**
Opportunities (for you)	**Threats (to you)**	**Our counter-position**

Competitor C

Homepage H1 (their claim)	Entry price	Free plan or trial
Top 5 features	**Who AI says it is best for (paste from answers)**	**Proof they lead with**
Where reviews say they are weak	**Strengths**	**Weaknesses**
Opportunities (for you)	**Threats (to you)**	**Our counter-position**

Competitor D

Homepage H1 (their claim)	Entry price	Free plan or trial
Top 5 features	**Who AI says it is best for (paste from answers)**	**Proof they lead with**
Where reviews say they are weak	**Strengths**	**Weaknesses**
Opportunities (for you)	**Threats (to you)**	**Our counter-position**

Competitor E

Homepage H1 (their claim)	Entry price	Free plan or trial
Top 5 features	**Who AI says it is best for (paste from answers)**	**Proof they lead with**
Where reviews say they are weak	**Strengths**	**Weaknesses**
Opportunities (for you)	**Threats (to you)**	**Our counter-position**

What to do with this: your top 3 counter-positions

Pick the three counter-positions with the most buyer prompts behind them. Each one needs a page that proves it, then a row on the Action list.

Counter-position to act on	Against	Page or proof that carries it	Prompts it should move
SAMPLE Price comparison page at 1M and 10M events	Competitor A	The comparison page vs Competitor A, with pricing rows at 1M and 10M events	P11, P13 (as on the Action list)

Action list

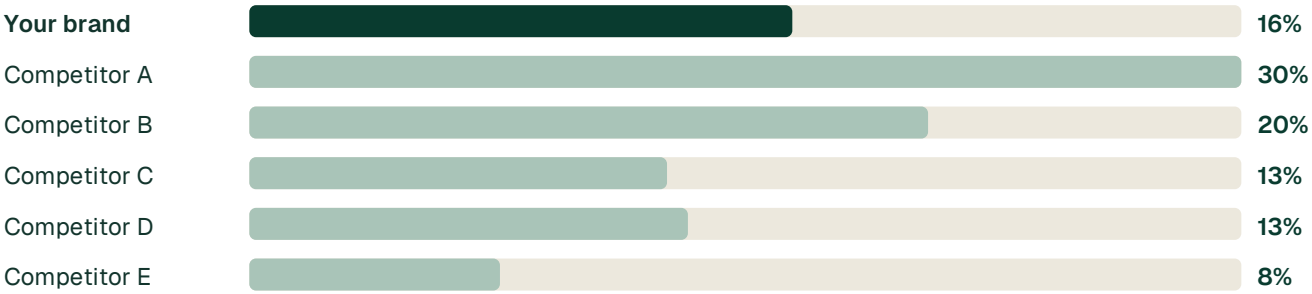
Priority = impact x (4 minus effort): 9 is high impact, low effort. Do the 9s first. Every action names the prompts it should move.

Action	Prompts	Impact	Effort	Priority	Owner / due	Done
SAMPLE Add a pricing FAQ that answers per-user vs per-event and annual terms in plain text	P17, P18	3	1	9	PMM Week 1	
SAMPLE Rewrite /security so SOC 2 Type II status, EU hosting and subprocessors are in plain text (today they sit in a PDF behind a form)	P22, P23	3	1	9	Security + PMM Week 2	
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐
		○ 1 ○ 2 ○ 3	○ 1 ○ 2 ○ 3			☐

Worked example (sample data)

A filled analysis for a fictional product analytics company and five fictional competitors, so you can see what the finished template tells you. All numbers on this page are sample data, not research.

SHARE OF VOICE, ALL ENGINES (SAMPLE)



Share of voice by engine (sample)

Brand	ChatGPT	Gemini	Perplexity	AI Overviews	Copilot
Your brand	16%	14%	11%	17%	25%
Competitor A	29%	27%	34%	32%	27%
Competitor B	19%	24%	23%	18%	16%
Competitor C	13%	14%	11%	12%	13%
Competitor D	11%	14%	11%	17%	13%
Competitor E	11%	6%	10%	5%	5%

What the sample says

- Competitor A leads with 30% share of voice. 'Your brand' ranks #3 of 6 at 16%.
- Your brand's best engine is Copilot (25% share), its weakest is Perplexity (11%). Start where the gap is widest.
- Most-cited source: g2.com/categories/product-analytics (cited 18 times). Cited pages that name two or more competitors but not you: reddit.com/r/ProductManagement, best-tools-blog.example/product-analytics, competitor-a.example/blog/alternatives, youtube.com (tutorial videos), industry-newsletter.example/analytics-stack.
- Content gaps where you have nothing and two or more competitors do: comparison page vs each top rival, alternatives page for each top rival, use-case pages by job to be done, free tool, template or calculator, original research or benchmark report, glossary of category terms.
- Top three actions by priority score: add a pricing FAQ that answers per-user vs per-event and annual terms in plain text; rewrite /security so SOC 2 Type II status, EU hosting and subprocessors are in plain text (today they sit in a PDF behind a form); get listed on the 3 most-cited 'best product analytics' listicles we are missing from.

AROBIS AI

SEO Audit Template

WITH AN AI VISIBILITY TAB

Site-level audit for B2B SaaS: method and pass/fail threshold for every check, an auto score by pillar, 20 buyer prompts and a 90-day plan.



Technical
13 checks



On-page + content
12 checks



Links + authority
10 checks



AI visibility
13 checks

48 site checks + 31 page checks, 20 buyer prompts x 5 engines x 3 runs, 90-day plan

How to use this template

A site-level SEO and AI visibility audit for B2B SaaS, for in-house SEO leads and agencies who need a scored baseline and a plan. 48 site checks across four pillars, each with the method (tool and menu path) and pass, partial and fail thresholds. Thresholds are Arobis AI house rules: adjust them, the score follows.

1. **How scoring works** Mark each check Pass, Partial, Fail or N/A. Pass = full weight, Partial = half, Fail = zero, N/A is left out. Each pillar scores 0 to 100. The overall score weights the pillars (Technical 30, On-page + content 25, Links + authority 20, AI visibility 25). Change the pillar weights on the Scorecard if your priorities differ.
2. **Page checks** The 31 page-level checks from the SEO + AI Search Checklist, run on up to five money pages (one column per page). They get their own Page score and stay out of the overall site score, so a strong blog cannot hide a weak pricing page.
3. **The AI prompt test** 20 buyer prompts written for an example category (product analytics). Rewrite them in your buyers' words, keep the stage mix. Run each in five engines, three times, and mark Yes when your brand is named. The tab calculates mention rate per prompt, per engine and overall.
4. **From findings to fixes** Every Fail and Partial goes on the Findings tab with evidence and a confidence rating (Low confidence drops the priority one band). The Fix list turns them into owned tasks with priority (P1 = this month), owner and due date, plus Applied and Verified columns: a fix is Done only when the Verified columns are filled. The 90-day plan runs in this order: baseline and fix, build the answer pages, earn mentions and re-measure.
5. **Why the redirect check is weight 3** A planned 301 that never got applied cost a B2B services company its rankings for that topic: position 11.5 fell to 95. Since then every planned action at Arobis AI sits in a ledger with an automated check.
6. **Sample data** Butter cells are a filled, clearly labeled sample audit of a fictional site. Overwrite them with your own results.
7. **Want a second pair of eyes?** The full Arobis AI Visibility Audit goes further: 40 buyer prompts on ChatGPT, Gemini, Claude and Perplexity (arobis.ai/ai-visibility-audit). Our SEO audit service: arobis.ai/seo-audit-services.

In the spreadsheet

Scorecard auto 0 to 100 per pillar, weighted overall, AI metrics with targets.
Technical, On-page + content, Links + authority, AI visibility checks with method and thresholds, a result dropdown.
Page checks 31 page-level checks on up to 5 money pages, own Page score.
AI prompt test 20 prompts x 5 engines x 3 runs, mention and citation rates.
Findings, Fix list, 90-day plan from problems to owned, dated and verified work.

In this PDF

Fillable: type into any box, click a circle or tick box, then save. Works in Acrobat, Preview, Chrome and Edge.
Printable: Letter size, portrait, clean margins.
Findings and Fix list open with butter
SAMPLE rows from a fictional audit.

Scorecard

Pass = full weight, Partial = half, Fail = zero, N/A is left out. Pillar score = points earned / points possible x 100. Overall = the pillar scores weighted 30 / 25 / 20 / 25.

SITE AUDITED | AUDITOR | AUDIT DATE

Pillar	Weight	Checks	Max points	Earned	Score	Fails
Technical	30	13	32			
On-page + content	25	12	30			
Links + authority	20	10	20			
AI visibility	25	13	28			
Overall	100	48				

AI visibility metrics (from the prompt test)

Metric	Baseline	Target (set your own)
Overall mention rate, 20 prompts		
Mention rate: ChatGPT		
Mention rate: Gemini		
Mention rate: Perplexity		
Mention rate: AI Overviews		
Mention rate: Copilot		
Citation rate		

Technical

WEIGHT 30, 13 CHECKS

Crawl, index, render, speed and redirects across the whole site. Thresholds are Arobis AI house rules for B2B SaaS: adjust to your site.

TA01 Money pages indexed

METHOD Search Console > Indexing > Pages. Filter the list of not-indexed URLs by /pricing, /integrations, /compare, /alternatives, /security.

PASS 0 money pages not indexed **PARTIAL** 1 to 2 not indexed **FAIL** 3 or more not indexed

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA02 Indexable pages vs sitemap

METHOD Compare Search Console 'Indexed' count with the number of URLs in your XML sitemap.

PASS Indexed within 10% of sitemap count **PARTIAL** Gap 10% to 30% **FAIL** Gap over 30%

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA03 Sitemap is clean

METHOD Screaming Frog > Mode > List > Download XML Sitemap > crawl. Count non-200, noindex and non-canonical URLs.

PASS 0 dirty URLs **PARTIAL** Under 2% dirty **FAIL** 2% or more dirty

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA04 Canonical agreement on money pages

METHOD Search Console > URL Inspection on each money page: user-declared vs Google-selected canonical.

PASS All match **PARTIAL** 1 mismatch **FAIL** 2 or more mismatch

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA05 Single host and protocol

METHOD curl -I the http, www and https variants of the homepage and /pricing.

PASS All variants 301 in one hop **PARTIAL** Two hops on some **FAIL** Any variant returns 200 or loops

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA06 Core Web Vitals (mobile)

METHOD Search Console > Experience > Core Web Vitals > Mobile. Thresholds from web.dev/articles/vitals (LCP 2.5 s, INP 200 ms, CLS 0.1).

PASS All URL groups Good **PARTIAL** Some groups Need improvement **FAIL** Any money page group Poor

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA07 Content readable without JavaScript

METHOD View source on homepage, pricing and one integration page. Search for a body sentence and each plan price.

PASS All text in raw HTML **PARTIAL** Some sections JS-only **FAIL** Main copy or pricing JS-only

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA08 Internal 404s

METHOD Screaming Frog > Response Codes > Client Error (4xx) > Inlinks.

PASS 0 internal links to 404s **PARTIAL** 1 to 10 **FAIL** More than 10

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA09 Redirect chains

METHOD Screaming Frog > Reports > Redirects > Redirect Chains.

PASS 0 chains **PARTIAL** 1 to 5 chains **FAIL** More than 5 chains

WEIGHT ●○○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

TA10 Planned redirects applied

METHOD Open your redirect sheet. curl -I every old URL.

PASS Every planned 301 live and tested **PARTIAL** 1 missing **FAIL** 2 or more missing

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

TA11 robots.txt does not block money paths or assets

METHOD yoursite.com/robots.txt and Search Console > Settings > robots.txt.

PASS No money path or asset blocked **PARTIAL** Minor path blocked (non-money) **FAIL** Money path or CSS/JS blocked

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

TA12 Orphan money pages

METHOD Screaming Frog (with sitemap + Search Console connected) > Crawl Analysis > Orphan URLs.

PASS 0 orphan money pages **PARTIAL** 1 orphan **FAIL** 2 or more orphans

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

TA13 Bing Webmaster Tools: verified, money pages indexed

METHOD bing.com/webmasters > URL Inspection on each money page, and Sitemaps. Bing's index sits behind Copilot answers.

PASS Verified, 0 money pages missing from Bing **PARTIAL** 1 to 2 missing **FAIL** 3 or more missing, or site not verified

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

POINTS EARNED	POINTS POSSIBLE	TECHNICAL SCORE

On-page + content

WEIGHT 25, 12 CHECKS

Do the pages that sell answer the buyer, own one term each and show proof? Thresholds are Arobis AI house rules for B2B SaaS: adjust to your site.

OA01 Unique titles with the target term first

METHOD Screaming Frog > Page Titles > Duplicate and Missing. Spot-check 10 money pages against your keyword map.

PASS 0 duplicates, target term early on 10 of 10 **PARTIAL** 7 to 9 of 10 **FAIL** 6 or fewer of 10

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA02 One H1 per page

METHOD Screaming Frog > H1 > Missing and Multiple.

PASS 0 issues on money pages **PARTIAL** 1 to 3 issues **FAIL** 4 or more

WEIGHT ●○○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA03 Answer-first openings

METHOD Read the first 100 words of 10 money pages and 10 top blog posts.

PASS 18 or more of 20 answer in sentence one **PARTIAL** 12 to 17 **FAIL** 11 or fewer

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA04 Keyword cannibalization

METHOD Search Console > Performance > Queries > each top 20 non-brand query > Pages tab.

PASS 0 terms with two pages splitting impressions **PARTIAL** 1 to 2 terms **FAIL** 3 or more terms

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA05 Pricing page answers buyer questions

METHOD Check /pricing for plans, limits, overage, annual vs monthly, contract length, trial, who each plan is for.

PASS All 7 answered in text **PARTIAL** 4 to 6 **FAIL** 3 or fewer

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA06 Comparison pages for top rivals

METHOD List top 5 rivals. Check /compare/brand-vs-rival exists for each.

PASS 5 of 5, fair and sourced **PARTIAL** 2 to 4 **FAIL** 0 to 1

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA07 Alternatives pages

METHOD Check /alternatives/rival for top 3 rivals.

PASS 3 of 3 **PARTIAL** 1 to 2 **FAIL** 0

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA08 Integration pages

METHOD Open /integrations. Count top 10 integrations with their own page (setup, data synced, limits).

PASS 10 of 10 **PARTIAL** 5 to 9 **FAIL** 4 or fewer

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA09 Security / trust page

METHOD Open /security or /trust.

PASS Certifications, hosting, subprocessors, DPA, SSO all in text **PARTIAL** Some answered **FAIL** No trust page

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA10 Named authors with bios

METHOD Check 10 blog posts.

PASS 10 of 10 named with author page **PARTIAL** 5 to 9 **FAIL** 4 or fewer

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA11 First-party proof on money pages

METHOD Check 10 money pages for an original metric, screenshot, workflow or customer result.

PASS 8 or more of 10 **PARTIAL** 4 to 7 **FAIL** 3 or fewer

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

OA12 Content decay

METHOD Search Console > Performance > compare last 3 months vs previous 3 > Pages, sort by click difference.

PASS No top-20 page down more than 30% **PARTIAL** 1 to 2 pages down more than 30% **FAIL** 3 or more

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

POINTS EARNED | POINTS POSSIBLE | ON-PAGE + CONTENT SCORE

Links + authority

WEIGHT 20, 10 CHECKS

Do trusted sites, reviews and communities point to you? Thresholds are Arobis AI house rules for B2B SaaS: adjust to your site.

LA01 Authority vs closest rivals

METHOD Ahrefs free Website Authority Checker for you and 3 closest rivals.

PASS Within 10 DR of rival median **PARTIAL** 10 to 25 below **FAIL** More than 25 below

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

LA02 Referring domains trend

METHOD Ahrefs Webmaster Tools (free) > Site Explorer > Referring domains chart, last 6 months.

PASS Growing **PARTIAL** Flat **FAIL** Falling

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

LA03 Links reach money pages

METHOD Ahrefs Webmaster Tools > Best by links. Count money pages with 1+ external referring domain.

PASS 5 or more money pages **PARTIAL** 2 to 4 **FAIL** 0 to 1

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

LA04 Listicle coverage

METHOD Google 'best [category]' incognito, US. Open top 10 results.

PASS Listed on 6 or more of 10 **PARTIAL** 3 to 5 **FAIL** 2 or fewer

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

LA05 G2 profile

METHOD g2.com product page and my.g2.com.

PASS Right category, complete profile, reviews in last 90 days **PARTIAL** Complete, no recent reviews **FAIL** Incomplete or wrong category

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

LA06 Capterra / GetApp profile

METHOD vendors.capterra.com.

PASS Complete with reviews **PARTIAL** Listed, thin **FAIL** Not listed

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

LA07 Reddit and community presence

METHOD Google: site:reddit.com "brand" (past year).

PASS Brand discussed in relevant threads, staff answer honestly **PARTIAL** Mentioned rarely **FAIL** Absent or negative only

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

LA08 Integration marketplace listings

METHOD Search AppExchange, HubSpot, Slack, Zapier marketplaces for your brand.

PASS Listed on every platform you integrate with **PARTIAL** Some **FAIL** None

WEIGHT ●○○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

LA09 Anchor text profile

METHOD Ahrefs Webmaster Tools > Anchors.

PASS Brand and URL anchors lead **PARTIAL** One commercial anchor repeated a lot **FAIL** Exact-match pattern across many sites

WEIGHT ●○○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

LA10 Consistent company description

METHOD Compare homepage, LinkedIn, Crunchbase, G2 one-liners.

PASS Identical category and one-liner **PARTIAL** Minor differences **FAIL** Different categories

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

POINTS EARNED	POINTS POSSIBLE	LINKS + AUTHORITY SCORE

AI visibility

WEIGHT 25, 13 CHECKS

Can AI engines read you, do they understand you, and do they recommend you? Thresholds are Arobis AI house rules for B2B SaaS: adjust to your site.

AA01 AI search crawlers allowed

METHOD robots.txt plus CDN bot settings (Cloudflare > Security > Settings, filter Bot traffic > AI Crawler and Agent access policies: Search and Agent allowed; plus any custom WAF rules). Check OAI-SearchBot, Claude-SearchBot, PerplexityBot, Googlebot, Bingbot.

PASS All allowed in robots.txt and CDN **PARTIAL** One blocked **FAIL** Two or more blocked

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

AA02 Training crawler decision documented

METHOD Compare robots.txt to your written decision for GPTBot, ClaudeBot, Google-Extended, Applebot-Extended, CCBot, meta-externalagent.

PASS Decision written and matching **PARTIAL** Matching but undocumented **FAIL** Accidental block or allow

WEIGHT ●○○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

AA03 AI bots receive 200s

METHOD Cloudflare > AI Crawl Control (requests and allowed or blocked per AI crawler), or server logs filtered by AI user agents, last 30 days.

PASS 200 on money pages **PARTIAL** Some 403 or 429 **FAIL** Mostly blocked

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

AA04 Organization schema with sameAs

METHOD validator.schema.org on the homepage.

PASS Valid, sameAs to 4+ official profiles **PARTIAL** Valid, fewer than 4 sameAs **FAIL** Missing or invalid

WEIGHT ●●●

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

AA05 Product schema

METHOD Rich Results Test on pricing or product page.

PASS Valid SoftwareApplication with offers **PARTIAL** Present with warnings **FAIL** Missing

WEIGHT ●●○

- ◯ Pass
- ◯ Partial
- ◯ Fail
- ◯ N/A

AA06 Article schema with author

METHOD validator.schema.org on 3 blog posts.

PASS BlogPosting with author Person on 3 of 3 **PARTIAL** 1 to 2 **FAIL** 0

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA07 llms.txt (optional)

METHOD Open yoursite.com/llms.txt. Free generator: arobis.ai/llms-txt-generator.

PASS Present and current, or a conscious skip **PARTIAL** Present but stale **FAIL** Broken file

WEIGHT ●○○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA08 AI describes the brand correctly

METHOD Ask ChatGPT, Perplexity, Gemini: 'What is [brand] and who is it for?'

PASS Correct category and ICP in all 3 **PARTIAL** Correct in 2 **FAIL** Wrong in 2 or more

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA09 AI mention rate on 20 buyer prompts

METHOD AI prompt test tab: 20 prompts x 5 engines x 3 runs. First audit: grade the method. Later audits: grade against the target on the Scorecard.

PASS First audit: all 300 runs recorded. Later: target met or within about 11 points of it (noise at 300 runs) **PARTIAL** First audit: fewer engines or runs. Later: 11 to 20 points below **FAIL** First audit: not run. Later: over 20 points below

WEIGHT ●●●

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA10 Citation rate

METHOD AI prompt test tab: prompts where any run cites your domain / 20. One prompt = 5 points, so a gap under about 35 points can be noise: read the trend across audits.

PASS First audit: citations recorded for every run. Later: target met **PARTIAL** First audit: some runs. Later: below target, up on the last audit **FAIL** First audit: not recorded. Later: below target, not up in two audits

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA11 GA4 shows AI visits as their own channel

METHOD GA4 > Reports > Acquisition > Traffic acquisition, Session default channel group: the AI Assistant row (default since May 13, 2026). Then Admin > Data display > Channel groups for a custom group that catches assistants the default misses.

PASS AI Assistant channel reviewed monthly, custom group for unrecognized assistants **PARTIAL** Default channel only **FAIL** AI visits not reported

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA12 **AI-sourced leads in CRM**

METHOD Demo form and CRM fields.

PASS Self-reported source + first-touch source stored **PARTIAL** One of the two **FAIL** Neither

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

AA13 **Snippet controls do not hide money-page answers**

METHOD View source and curl -I on each money page: look for nosnippet, max-snippet and data-nosnippet in meta robots, X-Robots-Tag and the HTML. Google lists these as the controls that limit what its AI features show (developers.google.com/search/docs/appearance/ai-features).

PASS None on money-page answers, or a written reason **PARTIAL** max-snippet above 0 on some money pages **FAIL** nosnippet, max-snippet:0 or data-nosnippet on a money-page answer

WEIGHT ●●○

- ○ Pass
- ○ Partial
- ○ Fail
- ○ N/A

POINTS EARNED	POINTS POSSIBLE	AI VISIBILITY SCORE

Page checks: up to 5 money pages

The 31 page-level checks from the SEO + AI Search Checklist (method and thresholds are there). Write P, Pa, F or N/A per page. The Page score stays out of the overall site score.

PAGE 1 URL	PAGE 2 URL	PAGE 3 URL	PAGE 4 URL	PAGE 5 URL

ID	Check	Wt	Sample	P1	P2	P3	P4	P5
T01	Page returns 200 and is indexable	3	P					
T02	Canonical points to itself, and Google agrees	3	P					
T07	Core Web Vitals pass on mobile	2	Pa					
T08	Body copy is in the raw HTML, not only rendered by JavaScript	3	Pa					
T09	Pricing plans are readable text, not an image or a calculator only	3	F					
T16	Mobile layout has no sideways scroll	1	P					
001	Title tag leads with the term the page should own	3	P					
002	One H1 that matches the search intent	2	P					
003	Meta description earns the click	1	Pa					
004	The first two sentences answer the main question	3	F					
005	H2s use the words buyers actually type	2	Pa					
006	Every section opens with a sentence that stands alone	2	Pa					

ID	Check	Wt	Sample	P1	P2	P3	P4	P5
O07	Out-links: three or more contextual links to related money pages	2	P					
O08	In-links: five or more with varied, descriptive anchors	3	Pa					
O09	URL slug is short, readable and stable	1	P					
O10	Images have alt text, modern formats and set dimensions	1	P					
O11	Product screenshots have captions in text	1	F					
O12	Comparison and pricing tables are HTML, not images	2	P					
O13	Open Graph image and tags set	1	P					
O14	One clear next step that fits the stage	2	P					
C01	The page owns one primary keyword no other page targets	3	P					
C02	A named author with a real bio	2	Pa					
C03	At least one thing only your company can say	3	F					
C04	Every statistic links to its primary source	2	P					
C05	Pricing page answers the buyer's real questions	3	Pa					
C11	Facts, screenshots and prices are still true	2	P					
C12	Format matches what already ranks	2	P					
C13	FAQ built from real sales objections	2	F					
A05	SoftwareApplication schema on the product or pricing page	2	Pa					
A06	BlogPosting schema with a real author	2	P					
A07	BreadcrumbList on deep pages	1	P					
	Page score (0 to 100)	65						

SAMPLE column = a pricing page of a fictional site. Wt = weight; the score row shows max points.

AI prompt test: how to run it

20 buyer prompts, 5 engines, 3 runs each = 300 answers. Plan a few hours, spread over three days in one week. It is the only honest baseline you will have.

1. **Same wording, every time** Paste the exact prompt. No follow-ups, no hints about your brand. Change the wording only between audits, never between runs.
2. **Clean sessions** ChatGPT: Temporary chat with search on. Gemini: new chat, signed out of Workspace history. Perplexity: new thread, default model. AI Overviews: Chrome incognito, US location, logged out. Copilot: new conversation.
3. **Three runs per engine** Answers vary from run to run. Run each prompt three times per engine on three different days in the same week. Mark Yes if your brand is named in that run.
4. **No AI Overview shown** If Google shows no AI Overview for a prompt, leave that run blank (on paper, write X in the box). Those runs are excluded from the rate, so they do not count against you.
5. **Cited** Mark 'Cited' if any run links to your domain as a source.

6. **Score** Mention rate = runs naming you divided by runs completed. The tab calculates it per prompt, per engine and overall, and feeds the Scorecard. Citation rate = prompts where any run cites your domain divided by 20, so it moves in 5-point steps.

7. **Read changes with care** At 300 runs, treat a move under about 11 points as noise: the threshold is 2.8 x sqrt(2 x p x (1 - p) / runs). Per engine (60 runs) only gaps of about 25 points are real. Citation rate rests on 20 prompts: one prompt is 5 points and a move under about 35 points can be noise. Report the three-month trend.

8. **Optional engines** Claude: add it as a sixth engine if your buyers use it. Google AI Mode: add it the same way (logged out, US, new session). AI Mode clicks also count in Search Console Web.

Why three runs: the same prompt can name different brands from one run to the next. One run is an anecdote; three runs per engine show whether you are reliably in the answer.

Persona variants (optional)

Buyers paste context, and engines change the shortlist because of it. Add these as extra rows when you want to see that effect.

- I am VP Product at a 200-person B2B SaaS company on Snowflake. Which product analytics tools should we shortlist?
- I run growth at a 40-person PLG startup with no data engineer. What product analytics tool should we start with?
- I am a CTO at a 1,000-person SaaS company with EU customers. Which product analytics vendors meet SOC 2 and EU hosting needs?

AI prompt test: 20 buyer prompts

Tick a box when that run names your brand. Write X in the box when Google shows no AI Overview: that run does not count. Mention rate per engine = ticks / runs completed in that engine (60 when every run had an answer). Overall = all ticks / all runs completed. Citation rate = Cited ticks / 20.

	ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	
Q01 **PROBLEM** How can I see which features our paying customers actually use?	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited
Q02 **PROBLEM** What should a SaaS product team track to improve trial-to-paid conversion?	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited
Q03 **CATEGORY** What is a product analytics platform and when does a B2B SaaS company need one?	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited
Q04 **CATEGORY** Product analytics vs Google Analytics 4 for a SaaS app: what is the difference?	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited

Q05 **BEST X** What is the best product analytics platform for a B2B SaaS company with 50 employees?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q06 **BEST X** Best product analytics software for product-led growth teams					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q07 **BEST X** Which product analytics tools are easiest to set up without an engineer?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q08 **BEST X** Top product analytics platforms for enterprise SaaS with SSO and EU data hosting					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q09 **BEST X** Best warehouse-native product analytics tools for Snowflake users					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q10 **X VS Y** [your brand] vs [Competitor A] for product analytics: which should we choose?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q11 **X VS Y** Is [your brand] better than [Competitor A] for funnel and retention analysis?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q12 **ALTERNATIVES** What are the best alternatives to [Competitor A]?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q13 **ALTERNATIVES** Cheaper alternatives to [Competitor B] for a startup					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q14 **PRICING** How much does [your brand] cost per month?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited
Q15 **PRICING** Which product analytics tools have a free plan or usage-based pricing?					
ChatGPT ☐ ☐ ☐	**Gemini** ☐ ☐ ☐	**Perplexity** ☐ ☐ ☐	**AI Overviews** ☐ ☐ ☐	**Copilot** ☐ ☐ ☐	☐ Cited

Q16 **INTEGRATIONS** Which product analytics tools integrate with Salesforce and HubSpot?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	
☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited

Q17 **INTEGRATIONS** Does [your brand] integrate with Snowflake and Segment?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	
☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited

Q18 **SECURITY** Which product analytics platforms are SOC 2 Type II certified and GDPR compliant?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	
☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited

Q19 **IMPLEMENTATION** How long does it take to implement [your brand], and what do customers say about support?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	
☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited

Q20 **IMPLEMENTATION** Which product analytics vendors have the best G2 reviews from B2B SaaS teams?

ChatGPT	Gemini	Perplexity	AI Overviews	Copilot	
☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐	☐ Cited

Findings

One row per Fail or Partial. P1 = high impact, not high effort: fix P1s this month. Low confidence drops a finding one band. The sample shows the 6 highest-impact of its 28 Fail or Partial results. Fourteen rows here; the spreadsheet has room for more.

Check	Finding	Evidence	Impact, effort, confidence, priority
SAMPLE AA01 (Fail)	OAI-SearchBot and PerplexityBot get 403 from the CDN	Cloudflare AI Crawler and Agent access policies block Search bots; AI Crawl Control shows both blocked	Impact High, effort Low, confidence High **P1**
SAMPLE TA10 (Fail)	4 planned 301s from the last migration were never applied	curl -I on the old URLs returns 404	Impact High, effort Low, confidence High **P1**
SAMPLE OA05 (Fail)	Pricing page answers 3 of 7 buyer questions	No overage, contract or trial info in text	Impact High, effort Medium, confidence High **P1**
SAMPLE OA04 (Partial)	Two posts split impressions for the head term	Search Console Pages tab shows 2 URLs for 1 term	Impact Medium, effort Low, confidence Medium **P2**
SAMPLE LA04 (Partial)	Listed on 3 of the top 10 'best [category]' lists	Incognito US check, 7 lists do not name us	Impact High, effort High, confidence High **P2**

Check	Finding	Evidence	Impact, effort, confidence, priority
SAMPLE AA04 (Fail)	No Organization schema on the homepage	validator.schema.org: none found	Impact Medium, effort Low, confidence High **P2**
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3
			IMPACT ◯ H ◯ M ◯ L EFFORT ◯ H ◯ M ◯ L CONF ◯ H ◯ M ◯ L PRIO ◯ P1 ◯ P2 ◯ P3

Fix list

Owned, dated, verified work. The first six rows (butter) are a sample from a fictional audit: overwrite them. Tick Verified only when the test in 'Verify by' has passed; the spreadsheet also records the Applied and Verified dates.

Fix	Pillar	Priority	Owner / due	Verify by (test)	Verified
Allow Search bots in Cloudflare's AI Crawler and Agent access policies so OAI-SearchBot and PerplexityBot get through	AI visibility	**P1**	Web lead Week 2	Server logs show 200 for OAI-SearchBot and PerplexityBot on /pricing; AI Crawl Control shows both allowed	☐
Apply the 4 missing 301s from the last site migration and test each with curl	Technical	**P1**	Web lead Week 2	curl -I on each old URL returns one 301 to the new URL	☐
Rewrite /pricing FAQ: per-seat vs usage, overage, annual terms, trial	On-page + content	**P1**	PMM Week 3	Pricing page answers all 7 buyer questions in plain text	☐
Merge two posts splitting impressions for the head term, 301 the weaker	On-page + content	**P2**	Content lead Week 4	Search Console Pages tab shows one URL for the head term	☐
Pitch the 4 most reachable of the 7 top-10 listicles that do not list us	Links + authority	**P2**	Content lead Month 3	Incognito US check: each pitched list names us	☐
Add Organization JSON-LD with sameAs to LinkedIn, Crunchbase, G2, YouTube	AI visibility	**P2**	Web lead Week 3	validator.schema.org shows Organization with 4 sameAs links	☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐
		○ P1 ○ P2 ○ P3			☐

90-day plan

Work in this order: baseline before any fix, so the change you report is real. Tick tasks as they ship.

Month 1: Baseline and fix

Done when: All P1 fixed. Baseline mention rate and citation rate recorded.

- [ ] Week 1: run the 20-prompt baseline (5 engines x 3 runs) before shipping any fix.
- [ ] Weeks 2 to 3: fix every P1 (indexing, blocked crawlers, missing redirects, JS-only pricing).
- [ ] Week 2: GA4 AI Assistant channel checked, custom group added for assistants it misses; CRM 'How did you hear about us' field live.
- [ ] Weeks 3 to 4: fix internal links to orphan money pages; Organization and SoftwareApplication schema.

Month 2: Build the answer pages

Done when: Every high-stage prompt maps to a page that answers it.

- [ ] Comparison pages for top 3 rivals, alternatives pages for top 2.
- [ ] Integration pages for the top 5 integrations your customers use.
- [ ] A trust page that answers the procurement prompts in plain text.
- [ ] Answer-first rewrite of the 10 money pages with the most impressions.

Month 3: Earn mentions and re-measure

Done when: Mention rate, citation rate and pillar scores compared with month 1.

- [ ] Pitch the most-cited third-party pages (listicles, review sites) from the Citation sources list.
- [ ] G2 review asks tied to renewals and success moments.
- [ ] Named staff answer in 2 to 3 relevant communities, following each one's rules.
- [ ] Re-run the 20-prompt test and re-score this audit. Report the change.

Notes and owners

AI-Ready Technical Kit

JSON-LD SCHEMA + ROBOTS.TXT FOR AI CRAWLERS

Complete, valid JSON-LD for a B2B SaaS site and three robots.txt files for AI crawlers, with every user agent checked against the vendor's own docs.

robots.txt

```
# Variant B: AI search yes, training no

User-agent: OAI-SearchBot
User-agent: Claude-SearchBot
User-agent: PerplexityBot
Disallow: /app/

User-agent: GPTBot
User-agent: ClaudeBot
User-agent: CCBot
Disallow: /
```

softwareapplication.json

```
{
  "@type": "SoftwareApplication",
  "name": "Example Analytics",
  "applicationCategory":
      "BusinessApplication",
  "offers": [{
    "@type": "Offer",
    "price": "499",
    "priceCurrency": "USD"
  }],
  "aggregateRating": {...}
```

How to use this template

The technical layer a B2B SaaS site needs before AI engines can read and trust it, for web leads and technical SEOs: complete JSON-LD (not skeletons), three robots.txt files for AI crawlers, and a crawler matrix you can edit to build your own robots.txt. Every user agent was checked against the vendor's own documentation; links are in the README and on the Sources page.

1. **Pick a robots.txt** A: allow AI search and training (most visibility). B: allow AI search, block training (the middle ground: you stay in AI search answers and opt out of training with vendors that honor it; Google-Extended is blocked, which does not touch Google Search or AI Overviews but also stops Gemini app grounding). C: block AI crawlers but keep Google and Bing search (you mostly disappear from ChatGPT, Claude and Perplexity answers; you stay in Copilot, AI Overviews and AI Mode, while Gemini app answers lose your pages because Google-Extended is blocked). Or set Allow/Block per bot on the Crawler matrix tab and copy the generated file.
2. **Two traps** 1) Your CDN can block bots that robots.txt allows. Check Cloudflare > Security > Settings, filter Bot traffic > AI Crawler and Agent access policies (Search and Agent allowed), and any WAF rules. 2) A bot that matches a named group ignores the * group, so every named group must repeat your private-path rules. Our files already do.
3. **Use the schema** Replace every example.com value with yours. Paste the JSON inside <script type="application/ld+json"> … </script> in the page head (Webflow: Page settings > Custom code; WordPress: a header plugin or your SEO plugin's schema field). Test each page in validator.schema.org and Google's Rich Results Test.
4. **Keep schema honest** Markup must match what is visible on the page: same prices, same questions, same ratings. Mismatched markup gets ignored, or worse.
5. **llms.txt** Not in this kit on purpose. Generate one free at arobis.ai/llms-txt-generator.

In the spreadsheet

Crawler matrix 23 bots, what each does, robots.txt behavior, A/B/C presets, your decision.
robots.txt your file, generated from your decisions.
Schema by page type which JSON-LD goes where, with a status column.
Sources vendor documentation for every token.

In this PDF

Copy-paste code for every file is in this PDF; the .json, .html and .txt files are in the kit zip. Code lines are wrapped for print. Copy from the files, not the PDF.
Your decision per bot and the schema checklist are fillable.

AI crawler matrix

Every token comes from the vendor's own documentation (sources on the last page). 'User fetch' bots act on a person's request; several vendors say they may not follow robots.txt.

A allow AI search and training **B** allow AI search, block training **C** block AI crawlers, keep Google and Bing search **Allow** **Block**

User agent	What it does	Follows robots.txt	A	B	C	Your call
`OAI-SearchBot` OpenAI, ai search	Indexes pages for ChatGPT search. OpenAI: sites opted out are not shown in ChatGPT search answers.	Yes	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`ChatGPT-User` OpenAI, user fetch	Visits a page when a ChatGPT user's request needs it. OpenAI: robots.txt rules may not apply.	May not apply	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`GPTBot` OpenAI, training	Crawls content that may be used to train OpenAI foundation models.	Yes	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`Claude-SearchBot` Anthropic, ai search	Crawls to improve Claude search results. Blocking it can reduce visibility in Claude answers.	Yes	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`Claude-User` Anthropic, user fetch	Fetches pages when a Claude user asks a question that needs them.	Yes	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`ClaudeBot` Anthropic, training	Collects content that could contribute to Anthropic model training.	Yes	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`PerplexityBot` Perplexity, ai search	Surfaces and links sites in Perplexity results. Perplexity says it is not used for foundation model training.	Yes	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`Perplexity-User` Perplexity, user fetch	Visits a page to answer a user's question. Perplexity: generally ignores robots.txt.	Generally no	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`Googlebot` Google, search	Google Search crawler. AI Overviews and AI Mode are part of Google Search.	Yes	**Allow**	**Allow**	**Allow**	◯ Allow ◯ Block
`Google-Extended` Google, training + gemini grounding	Not a separate crawler. Controls use for Gemini training and for grounding answers in the Gemini app and Vertex AI. Google: does not affect inclusion or ranking in Google Search, and AI Overviews and AI Mode run on Googlebot. Variant B blocks it.	Yes (token)	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`bingbot` Microsoft, search	Bing search crawler. Copilot answers draw on the Bing index, so blocking it also hurts Copilot.	Yes	**Allow**	**Allow**	**Allow**	◯ Allow ◯ Block

User agent	What it does	Follows robots.txt	A	B	C	Your call
`Applebot` Apple, search	Powers search in Spotlight, Siri and Safari. Apple says its data may also feed model training.	Yes	**Allow**	**Allow**	**Allow**	◯ Allow ◯ Block
`Applebot-Extended` Apple, training token	Does not crawl. Disallowing it opts content out of training Apple foundation models; pages stay in Apple search.	Yes (token)	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`CCBot` Common Crawl, open dataset	Builds the Common Crawl open web archive, which many AI training sets are built from.	Yes	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`meta-externalagent` Meta, training + indexing	Crawls for uses such as training AI models and indexing content directly for Meta products, so blocking it can also affect Meta AI answers.	Yes	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`meta-externalfetcher` Meta, user fetch	Fetches links a user asked for. Meta: may bypass robots.txt.	May bypass	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`Amzn-SearchBot` Amazon, ai search	Powers search in Amazon products, including Alexa. Amazon: not used for generative AI training.	Yes	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`Amzn-User` Amazon, user fetch	Fetches live pages to answer a user's Alexa request. Amazon: may not follow all robots.txt directives.	May not follow all	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`Amazonbot` Amazon, training + products	Improves Amazon products and answers. Amazon: may be used to train Amazon AI models.	Yes	**Allow**	**Block**	**Block**	◯ Allow ◯ Block
`DuckAssistBot` DuckDuckGo, ai search	Crawls pages in real time for DuckDuckGo's AI-assisted answers. DuckDuckGo: not used to train AI models.	Yes (robots.txt opt-out)	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`MistralAI-Index` Mistral, ai search	Feeds Mistral search for answers in Mistral's assistant (Vibe). Mistral: not used for training.	Not stated	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`MistralAI-User` Mistral, user fetch	Visits a page when a user asks Mistral's assistant a question.	Not stated	**Allow**	**Allow**	**Block**	◯ Allow ◯ Block
`MistralAI-Training` Mistral, training	Builds datasets to train Mistral models. Mistral: disallow it in robots.txt to opt out.	Yes	**Allow**	**Block**	**Block**	◯ Allow ◯ Block

Variant A: allow AI search and training

Most visibility. You stay in every AI answer and your content can be used in model training.

robots/robots-A-allow-ai-search-and-training.txt

```
# robots.txt, Variant A: allow AI search and AI training
# From the AI-Ready Technical Kit by Arobis AI (arobis.ai/blog/seo-templates).
# Replace example.com and the private paths, then test in Search Console.
# A crawler follows only the most specific group that names it, so every
# named group below repeats the private-path rules.

User-agent: *
Disallow: /app/
Disallow: /api/
Disallow: /admin/
Disallow: /login

# Allowed bots
User-agent: OAI-SearchBot
User-agent: ChatGPT-User
User-agent: GPTBot
User-agent: Claude-SearchBot
User-agent: Claude-User
User-agent: ClaudeBot
User-agent: PerplexityBot
User-agent: Perplexity-User
User-agent: Googlebot
User-agent: Google-Extended
User-agent: bingbot
User-agent: Applebot
User-agent: Applebot-Extended
User-agent: CCBot
User-agent: meta-externalagent
User-agent: meta-externalfetcher
User-agent: Amzn-SearchBot
User-agent: Amzn-User
User-agent: Amazonbot
User-agent: DuckAssistBot
User-agent: MistralAI-Index
User-agent: MistralAI-User
User-agent: MistralAI-Training
Disallow: /app/
Disallow: /api/
Disallow: /admin/
Disallow: /login

Sitemap: https://www.example.com/sitemap.xml
```

Variant B: AI search yes, training no

The middle ground: you stay in AI search answers and opt out of training with vendors that honor these tokens. Google-Extended is blocked: Search and AI Overviews run on Googlebot, so only Gemini app grounding is affected. Blocking meta-externalagent can also affect Meta AI answers.

robots/robots-B-allow-ai-search-block-training.txt

```
# robots.txt, Variant B: allow AI search, block AI training
# From the AI-Ready Technical Kit by Arobis AI (arobis.ai/blog/seo-templates).
# Replace example.com and the private paths, then test in Search Console.
# Google-Extended is blocked. Search and AI Overviews use Googlebot.
# It also stops Gemini app grounding: allow it if that matters to you.
# A crawler follows only the most specific group that names it, so every
# named group below repeats the private-path rules.

User-agent: *
Disallow: /app/
Disallow: /api/
Disallow: /admin/
Disallow: /login

# Allowed bots
User-agent: OAI-SearchBot
User-agent: ChatGPT-User
User-agent: Claude-SearchBot
User-agent: Claude-User
User-agent: PerplexityBot
User-agent: Perplexity-User
User-agent: Googlebot
User-agent: bingbot
User-agent: Applebot
User-agent: meta-externalfetcher
User-agent: Amzn-SearchBot
User-agent: Amzn-User
User-agent: DuckAssistBot
User-agent: MistralAI-Index
User-agent: MistralAI-User
Disallow: /app/
Disallow: /api/
Disallow: /admin/
Disallow: /login

# Blocked bots
User-agent: GPTBot
User-agent: ClaudeBot
User-agent: Google-Extended
User-agent: Applebot-Extended
User-agent: CCBot
User-agent: meta-externalagent
User-agent: Amazonbot
User-agent: MistralAI-Training
Disallow: /

# Bing honors an AI-training group from Feb 1, 2027 (Google: early 2027).
# Add when ready:  User-agent: __usage_ai-training  then  Disallow: /

Sitemap: https://www.example.com/sitemap.xml
```

Variant C: block AI, keep Google and Bing

You mostly leave ChatGPT, Claude, Perplexity and Mistral answers. Copilot still draws on bingbot and AI Overviews on Googlebot, so you stay in Copilot, AI Overviews and AI Mode. Gemini app answers lose your pages because Google-Extended is blocked.

robots/robots-C-block-ai-keep-google-bing.txt

```
# robots.txt, Variant C: block AI crawlers, keep Google and Bing search
# From the AI-Ready Technical Kit by Arobis AI (arobis.ai/blog/seo-templates).
# Replace example.com and the private paths, then test in Search Console.
# You stay in Copilot (bingbot), AI Overviews and AI Mode (Googlebot). Gemini
  app loses you.
# A crawler follows only the most specific group that names it, so every
# named group below repeats the private-path rules.

User-agent: *
Disallow: /app/
Disallow: /api/
Disallow: /admin/
Disallow: /login

# Allowed bots
User-agent: Googlebot
User-agent: bingbot
User-agent: Applebot
Disallow: /app/
Disallow: /api/
Disallow: /admin/
Disallow: /login

# Blocked bots
User-agent: OAI-SearchBot
User-agent: ChatGPT-User
User-agent: GPTBot
User-agent: Claude-SearchBot
User-agent: Claude-User
User-agent: ClaudeBot
User-agent: PerplexityBot
User-agent: Perplexity-User
User-agent: Google-Extended
User-agent: Applebot-Extended
User-agent: CCBot
User-agent: meta-externalagent
User-agent: meta-externalfetcher
User-agent: Amzn-SearchBot
User-agent: Amzn-User
User-agent: Amazonbot
User-agent: DuckAssistBot
User-agent: MistralAI-Index
User-agent: MistralAI-User
User-agent: MistralAI-Training
Disallow: /

# User fetchers may ignore robots.txt: enforce blocks at your CDN or WAF.

# Bing honors an AI-training group from Feb 1, 2027 (Google: early 2027).
# Add when ready:  User-agent: __usage_ai-training  then  Disallow: /

Sitemap: https://www.example.com/sitemap.xml
```

Organization

GOES ON	REPLACE AND CHECK
Homepage (and About)	name, legalName, url, logo, description, founder, address, contactPoint, sameAs (your real profiles only; delete Wikidata if you have no item).

schema/organization.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "Organization",
  "@id": "https://www.example.com/#organization",
  "name": "Example Analytics",
  "legalName": "Example Analytics, Inc.",
  "url": "https://www.example.com/",
  "logo": {
    "@type": "ImageObject",
    "url": "https://www.example.com/images/logo-512.png",
    "width": 512,
    "height": 512
  },
  "description": "Example Analytics is a product analytics platform for B2B
    SaaS teams that runs directly on your data warehouse.",
  "slogan": "Product analytics on the data you already own",
  "foundingDate": "2019",
  "founder": {
    "@type": "Person",
    "name": "Jane Founder",
    "jobTitle": "Co-founder and CEO",
    "sameAs": [
      "https://www.linkedin.com/in/jane-founder"
    ]
  },
  "numberOfEmployees": {
    "@type": "QuantitativeValue",
    "minValue": 51,
    "maxValue": 200
  },
  "address": {
    "@type": "PostalAddress",
    "streetAddress": "100 Example Street",
    "addressLocality": "New York",
    "addressRegion": "NY",
    "postalCode": "10001",
    "addressCountry": "US"
  },
  "contactPoint": [
    {
      "@type": "ContactPoint",
      "contactType": "sales",
      "email": "sales@example.com",
      "url": "https://www.example.com/contact-sales",
      "availableLanguage": [
```

```
        "English"
      ]
    },
    {
      "@type": "ContactPoint",
      "contactType": "customer support",
      "email": "support@example.com",
      "url": "https://www.example.com/support",
      "availableLanguage": [
        "English"
      ]
    }
  ],
  "knowsAbout": [
    "Product analytics",
    "Retention analysis",
    "Funnel analysis",
    "Data warehouse",
    "Product-led growth"
  ],
  "sameAs": [
    "https://www.linkedin.com/company/example-analytics",
    "https://x.com/exampleanalytics",
    "https://www.youtube.com/@exampleanalytics",
    "https://www.crunchbase.com/organization/example-analytics",
    "https://www.g2.com/products/example-analytics/reviews",
    "https://github.com/example-analytics",
    "https://www.wikidata.org/wiki/Q000000000"
  ]
}
</script>
```

WebSite

GOES ON	REPLACE AND CHECK
Homepage	name, alternateName, url. No SearchAction: Google no longer shows the sitelinks search box.

schema/website.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "WebSite",
  "@id": "https://www.example.com/#website",
  "name": "Example Analytics",
  "alternateName": "Example Analytics product analytics",
  "url": "https://www.example.com/",
  "inLanguage": "en-US",
  "publisher": {
    "@id": "https://www.example.com/#organization"
  }
}
```

```
</script>
```

SoftwareApplication + Offer

GOES ON	REPLACE AND CHECK
Product or pricing page	Every plan and price must match the visible pricing page. Google requires name, offers.price and aggregateRating or review; only mark up ratings that are visible on the page.

schema/softwareapplication.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "SoftwareApplication",
  "@id": "https://www.example.com/#software",
  "name": "Example Analytics",
  "description": "Warehouse-native product analytics for B2B SaaS: funnels,
    retention, feature adoption and account-level reporting on Snowflake,
    BigQuery or Databricks.",
  "url": "https://www.example.com/product",
  "applicationCategory": "BusinessApplication",
  "applicationSubCategory": "Product analytics",
  "operatingSystem": "Web browser",
  "image": "https://www.example.com/images/product-dashboard-1200.png",
  "screenshot": "https://www.example.com/images/retention-report-1600.png",
  "featureList": [
    "Funnel analysis",
    "Retention and cohort analysis",
    "Feature adoption tracking",
    "Account-level reporting",
    "Snowflake, BigQuery and Databricks connectors",
    "Salesforce and HubSpot sync",
    "SSO (SAML) and SCIM",
    "EU and US data hosting"
  ],
  "softwareHelp": {
    "@type": "CreativeWork",
    "url": "https://docs.example.com/"
  },
  "releaseNotes": "https://www.example.com/changelog",
  "publisher": {
    "@id": "https://www.example.com/#organization"
  },
  "offers": [
    {
      "@type": "Offer",
      "name": "Free",
      "price": "0",
      "priceCurrency": "USD",
      "url": "https://www.example.com/pricing",
      "description": "Up to 10,000 tracked users, 3 seats, community support."
    },
```

```
    {
      "@type": "Offer",
      "name": "Growth",
      "price": "499",
      "priceCurrency": "USD",
      "url": "https://www.example.com/pricing",
      "description": "Up to 100,000 tracked users, unlimited seats, Salesforce
        and HubSpot sync.",
      "priceSpecification": {
        "@type": "UnitPriceSpecification",
        "price": "499",
        "priceCurrency": "USD",
        "unitText": "month",
        "billingDuration": "P1M"
      }
    },
    {
      "@type": "Offer",
      "name": "Enterprise",
      "price": "2000",
      "priceCurrency": "USD",
      "url": "https://www.example.com/pricing",
      "description": "Custom volume, SSO and SCIM, EU hosting, annual contract.
        Starting price shown.",
      "priceSpecification": {
        "@type": "UnitPriceSpecification",
        "minPrice": "2000",
        "priceCurrency": "USD",
        "unitText": "month",
        "billingDuration": "P1M"
      }
    }
  ],
  "aggregateRating": {
    "@type": "AggregateRating",
    "ratingValue": "4.6",
    "bestRating": "5",
    "worstRating": "1",
    "ratingCount": "128",
    "reviewCount": "128"
  }
}
</script>
```

Product

GOES ON	REPLACE AND CHECK
Add-on, hardware or one-off product page	Use for things sold as a product (add-ons, devices, services with a fixed price). For the main SaaS app, use SoftwareApplication.

schema/product.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "Product",
  "@id": "https://www.example.com/add-ons/data-residency#product",
  "name": "EU Data Residency add-on",
  "description": "Keeps all Example Analytics event data and backups in EU
    (Frankfurt) data centers. Available on Growth and Enterprise plans.",
  "image": "https://www.example.com/images/eu-residency-1200.png",
  "brand": {
    "@type": "Brand",
    "name": "Example Analytics"
  },
  "sku": "EA-ADDON-EU",
  "category": "Software add-on",
  "offers": {
    "@type": "Offer",
    "price": "300",
    "priceCurrency": "USD",
    "url": "https://www.example.com/add-ons/data-residency",
    "availability": "https://schema.org/InStock",
    "priceSpecification": {
      "@type": "UnitPriceSpecification",
      "price": "300",
      "priceCurrency": "USD",
      "unitText": "month",
      "billingDuration": "P1M"
    },
    "seller": {
      "@id": "https://www.example.com/#organization"
    }
  },
  "aggregateRating": {
    "@type": "AggregateRating",
    "ratingValue": "4.7",
    "bestRating": "5",
    "reviewCount": "23"
  }
}
</script>
```

FAQPage

GOES ON	REPLACE AND CHECK
Pricing, comparison or trust page with a visible FAQ	Questions and answers must be visible on the page, word for word. Google no longer shows the FAQ rich result in Search, but the markup is valid schema.org and keeps your Q&A machine-readable.

schema/faqpage.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "FAQPage",
  "@id": "https://www.example.com/pricing#faq",
  "mainEntity": [
    {
      "@type": "Question",
      "name": "How is Example Analytics priced?",
      "acceptedAnswer": {
        "@type": "Answer",
        "text": "Pricing is based on monthly tracked users, not events or
          seats. The Free plan covers up to 10,000 tracked users. Growth starts
          at $499 per month for up to 100,000 tracked users with unlimited
          seats. Enterprise is an annual contract starting at $2,000 per month."
      }
    },
    {
      "@type": "Question",
      "name": "Does Example Analytics integrate with Salesforce and HubSpot?",
      "acceptedAnswer": {
        "@type": "Answer",
        "text": "Yes. On Growth and Enterprise, account and user properties
          sync both ways with Salesforce and HubSpot every hour. Setup takes
          about 15 minutes and needs admin access to the CRM."
      }
    },
    {
      "@type": "Question",
      "name": "Is Example Analytics SOC 2 compliant?",
      "acceptedAnswer": {
        "@type": "Answer",
        "text": "Example Analytics holds a SOC 2 Type II report, renewed every
          year. Customers can request it under NDA from the trust page, along
          with the DPA and subprocessor list."
      }
    },
    {
      "@type": "Question",
      "name": "Can we keep our data in the EU?",
      "acceptedAnswer": {
        "@type": "Answer",
        "text": "Yes. The EU Data Residency add-on keeps all event data and
          backups in Frankfurt. It is available on Growth and Enterprise plans."
      }
```

```
    }
  ]
}
</script>
```

BlogPosting with author

GOES ON	REPLACE AND CHECK
Every blog post (map fields in the CMS template)	headline, description, image, datePublished, dateModified (only when the content really changed), author Person with url, jobTitle and sameAs.

schema/blogposting.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "BlogPosting",
  "@id": "https://www.example.com/blog/feature-adoption-metrics#article",
  "headline": "Feature Adoption Metrics: 7 Numbers B2B SaaS Product Teams
    Should Track",
  "description": "The seven feature adoption metrics we use with B2B SaaS
    product teams, how to calculate each one and what good looks like.",
  "image": [
    "https://www.example.com/images/blog/feature-adoption-1200x630.png"
  ],
  "datePublished": "2026-01-15T09:00:00-05:00",
  "dateModified": "2026-03-02T09:00:00-05:00",
  "inLanguage": "en-US",
  "wordCount": 2400,
  "articleSection": "Product analytics",
  "keywords": [
    "feature adoption",
    "product analytics",
    "B2B SaaS metrics"
  ],
  "mainEntityOfPage": {
    "@type": "WebPage",
    "@id": "https://www.example.com/blog/feature-adoption-metrics"
  },
  "author": {
    "@type": "Person",
    "@id": "https://www.example.com/authors/sam-writer#person",
    "name": "Sam Writer",
    "url": "https://www.example.com/authors/sam-writer",
    "jobTitle": "Head of Product Analytics",
    "sameAs": [
      "https://www.linkedin.com/in/sam-writer"
    ],
    "worksFor": {
      "@id": "https://www.example.com/#organization"
    }
  },
  "publisher": {
```

```
    "@id": "https://www.example.com/#organization"
  }
}
</script>
```

BreadcrumbList

GOES ON	REPLACE AND CHECK
Any page two or more levels deep	Match the visible breadcrumb exactly. position starts at 1.

schema/breadcrumblist.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "BreadcrumbList",
  "itemListElement": [
    {
      "@type": "ListItem",
      "position": 1,
      "name": "Home",
      "item": "https://www.example.com/"
    },
    {
      "@type": "ListItem",
      "position": 2,
      "name": "Integrations",
      "item": "https://www.example.com/integrations"
    },
    {
      "@type": "ListItem",
      "position": 3,
      "name": "Salesforce",
      "item": "https://www.example.com/integrations/salesforce"
    }
  ]
}
</script>
```

Review

GOES ON	REPLACE AND CHECK
Customer story or review page about your product	Only for a review shown on the page. Google does not show review snippets for reviews a business publishes about itself as an Organization; reviewing the SoftwareApplication is the eligible path.

schema/review.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "Review",
  "@id": "https://www.example.com/customers/acme-review#review",
  "itemReviewed": {
    "@type": "SoftwareApplication",
    "@id": "https://www.example.com/#software",
    "name": "Example Analytics",
    "applicationCategory": "BusinessApplication",
    "operatingSystem": "Web browser",
    "offers": {
      "@type": "Offer",
      "price": "499",
      "priceCurrency": "USD"
    }
  },
  "reviewRating": {
    "@type": "Rating",
    "ratingValue": "5",
    "bestRating": "5",
    "worstRating": "1"
  },
  "name": "We finally see which features our paying accounts use",
  "reviewBody": "We connected Example Analytics to Snowflake in an afternoon.
    Within two weeks our product team could see feature adoption by account
    tier, which changed what we built next quarter.",
  "author": {
    "@type": "Person",
    "name": "Alex Reviewer",
    "jobTitle": "VP Product"
  },
  "datePublished": "2026-02-10"
}
</script>
```

@graph: Organization + WebSite + SoftwareApplication

GOES ON	REPLACE AND CHECK
Homepage, one script tag	Same nodes linked by @id so engines read them as one entity. The SoftwareApplication node is the short version: keep offers and ratings off the homepage unless they are visible there.

schema/homepage-graph.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@graph": [
    {
      "@type": "Organization",
      "@id": "https://www.example.com/#organization",
      "name": "Example Analytics",
      "legalName": "Example Analytics, Inc.",
      "url": "https://www.example.com/",
      "logo": {
        "@type": "ImageObject",
        "url": "https://www.example.com/images/logo-512.png",
        "width": 512,
        "height": 512
      },
      "description": "Example Analytics is a product analytics platform for B2B
        SaaS teams that runs directly on your data warehouse.",
      "slogan": "Product analytics on the data you already own",
      "foundingDate": "2019",
      "founder": {
        "@type": "Person",
        "name": "Jane Founder",
        "jobTitle": "Co-founder and CEO",
        "sameAs": [
          "https://www.linkedin.com/in/jane-founder"
        ]
      },
      "numberOfEmployees": {
        "@type": "QuantitativeValue",
        "minValue": 51,
        "maxValue": 200
      },
      "address": {
        "@type": "PostalAddress",
        "streetAddress": "100 Example Street",
        "addressLocality": "New York",
        "addressRegion": "NY",
        "postalCode": "10001",
        "addressCountry": "US"
      },
      "contactPoint": [
        {
```

```
        "@type": "ContactPoint",
        "contactType": "sales",
        "email": "sales@example.com",
        "url": "https://www.example.com/contact-sales",
        "availableLanguage": [
          "English"
        ]
      },
      {
        "@type": "ContactPoint",
        "contactType": "customer support",
        "email": "support@example.com",
        "url": "https://www.example.com/support",
        "availableLanguage": [
          "English"
        ]
      }
    ],
    "knowsAbout": [
      "Product analytics",
      "Retention analysis",
      "Funnel analysis",
      "Data warehouse",
      "Product-led growth"
    ],
    "sameAs": [
      "https://www.linkedin.com/company/example-analytics",
      "https://x.com/exampleanalytics",
      "https://www.youtube.com/@exampleanalytics",
      "https://www.crunchbase.com/organization/example-analytics",
      "https://www.g2.com/products/example-analytics/reviews",
      "https://github.com/example-analytics",
      "https://www.wikidata.org/wiki/Q000000000"
    ]
  },
  {
    "@type": "WebSite",
    "@id": "https://www.example.com/#website",
    "name": "Example Analytics",
    "alternateName": "Example Analytics product analytics",
    "url": "https://www.example.com/",
    "inLanguage": "en-US",
    "publisher": {
      "@id": "https://www.example.com/#organization"
    }
  },
  {
    "@type": "SoftwareApplication",
    "@id": "https://www.example.com/#software",
    "name": "Example Analytics",
    "description": "Warehouse-native product analytics for B2B SaaS: funnels,
      retention, feature adoption and account-level reporting on Snowflake,
      BigQuery or Databricks.",
    "url": "https://www.example.com/product",
    "applicationCategory": "BusinessApplication",
    "operatingSystem": "Web browser",
```

```
      "publisher": {
        "@id": "https://www.example.com/#organization"
      }
    }
  ]
}
</script>
```

ProfilePage with Person (author)

GOES ON	REPLACE AND CHECK
Every author page	The Person @id matches the author in blogposting.json, so posts and author page read as one person. Use the real bio, photo and LinkedIn URL.

schema/profilepage.json

```
<script type="application/ld+json">
{
  "@context": "https://schema.org",
  "@type": "ProfilePage",
  "@id": "https://www.example.com/authors/sam-writer",
  "url": "https://www.example.com/authors/sam-writer",
  "dateCreated": "2025-09-01T09:00:00-05:00",
  "dateModified": "2026-03-02T09:00:00-05:00",
  "mainEntity": {
    "@type": "Person",
    "@id": "https://www.example.com/authors/sam-writer#person",
    "name": "Sam Writer",
    "jobTitle": "Head of Product Analytics",
    "description": "Sam leads product analytics at Example Analytics and has
      run analytics programs for B2B SaaS product teams for ten years.",
    "image": "https://www.example.com/images/authors/sam-writer-400.jpg",
    "sameAs": [
      "https://www.linkedin.com/in/sam-writer"
    ],
    "worksFor": {
      "@id": "https://www.example.com/#organization"
    }
  }
}
</script>
```

Which schema goes on which page

Tick each page type once the markup is live and passes validator.schema.org and Google's Rich Results Test.

Page type	Schema to add	Note	Added	Valid
Homepage	Organization, WebSite (or homepage-graph.json)	One script tag with @graph keeps it tidy.	☐	☐
Pricing	SoftwareApplication + Offer, FAQPage if an FAQ is visible	Prices must match the page.	☐	☐
Product / feature page	SoftwareApplication (link with @id), BreadcrumbList	Do not duplicate ratings on every page.	☐	☐
Integration page	BreadcrumbList	Optional: SoftwareApplication for the integration if you sell it separately.	☐	☐
Comparison / alternatives page	BreadcrumbList, FAQPage if an FAQ is visible	Never mark up a rival's ratings.	☐	☐
Blog post	BlogPosting, BreadcrumbList	Author Person with sameAs on every post.	☐	☐
Author page	ProfilePage with Person as mainEntity (profilepage.json)	Job title, sameAs LinkedIn, worksFor your Organization.	☐	☐
Customer story	Article (no file in this kit, see schema.org/Article), Review if a rating is shown	Customer named with permission.	☐	☐
Docs article	TechArticle (no file in this kit, see schema.org/TechArticle), BreadcrumbList	Lives on docs. subdomain, same Organization @id.	☐	☐
Careers listing	JobPosting (no file in this kit, see schema.org/JobPosting)	Remove when the job closes.	☐	☐
Event or webinar	Event (no file in this kit, see schema.org/Event)	eventAttendanceMode = OnlineEventAttendanceMode.	☐	☐

llms.txt

Not in this kit on purpose. Generate one free at arobis.ai/llms-txt-generator. No major engine has documented using it for ranking, so treat it as a cheap extra, not a lever.

Sources: vendor documentation

Each user-agent token and behavior in this kit was checked against these pages. Vendors add bots: re-check this list when you edit your robots.txt. Bots no vendor documents (for example cohere-ai, Bytespider) are left out; block them at your CDN or WAF if they show up in your logs.

Vendor	Tokens	Documentation (click to open)
OpenAI	`OAI-SearchBot, ChatGPT-User, GPTBot`	developers.openai.com: Bots
Anthropic	`Claude-SearchBot, Claude-User, ClaudeBot`	support.claude.com: crawler and blocking
Perplexity	`PerplexityBot, Perplexity-User`	docs.perplexity.ai: Bots
Google	`Googlebot, Google-Extended`	developers.google.com: common crawlers
Microsoft Bing	`bingbot`	bing.com/webmasters: which crawlers Bing uses
Apple	`Applebot, Applebot-Extended`	support.apple.com: About Applebot
Common Crawl	`CCBot`	commoncrawl.org: CCBot
Meta	`meta-externalagent, meta-externalfetcher`	developers.facebook.com: web crawlers
Amazon	`Amzn-SearchBot, Amzn-User, Amazonbot`	developer.amazon.com: Amazonbot
DuckDuckGo	`DuckAssistBot`	duckduckgo.com help: DuckAssistBot
Mistral	`MistralAI-Index, MistralAI-User, MistralAI-Training`	docs.mistral.ai: robots

- Google software app rich results: required name, offers.price, aggregateRating or review
- Google FAQPage: the FAQ rich result is no longer shown in Google Search
- Vercel study: OpenAI and Anthropic crawlers do not execute JavaScript

Also watch	
Bing AI training group	From Feb 1, 2027 Bing honors one robots.txt group for AI training: User-agent: __usage_ai-training with Disallow: /. Google intends to support it in early 2027. Variants B and C carry it as a comment, ready to switch on.
Bing AI grounding	Page level only: a meta robots or X-Robots-Tag value ai-grounding:disallow keeps a page out of AI answers; ai-grounding:disallowextended applies to Microsoft-operated surfaces only (Copilot, AI answers in Bing, Microsoft 365).
Cloudflare	AI Crawler and Agent access policies live under Security > Settings, filter Bot traffic, with Search, Agent and Training behaviors. Allow Search and Agent if you want AI answers to cite you.
Unlisted bots	cohere-ai, Bytespider and other agents no vendor documents are not in this kit. If they show up in your logs, block them at the CDN or WAF, not in robots.txt.

SEO Report Template

WITH AI SEARCH KPIs, TIED TO PIPELINE

The monthly report a CMO actually reads: SEO and AI search KPIs side by side, tied to demos and pipeline, with every number defined and sourced.

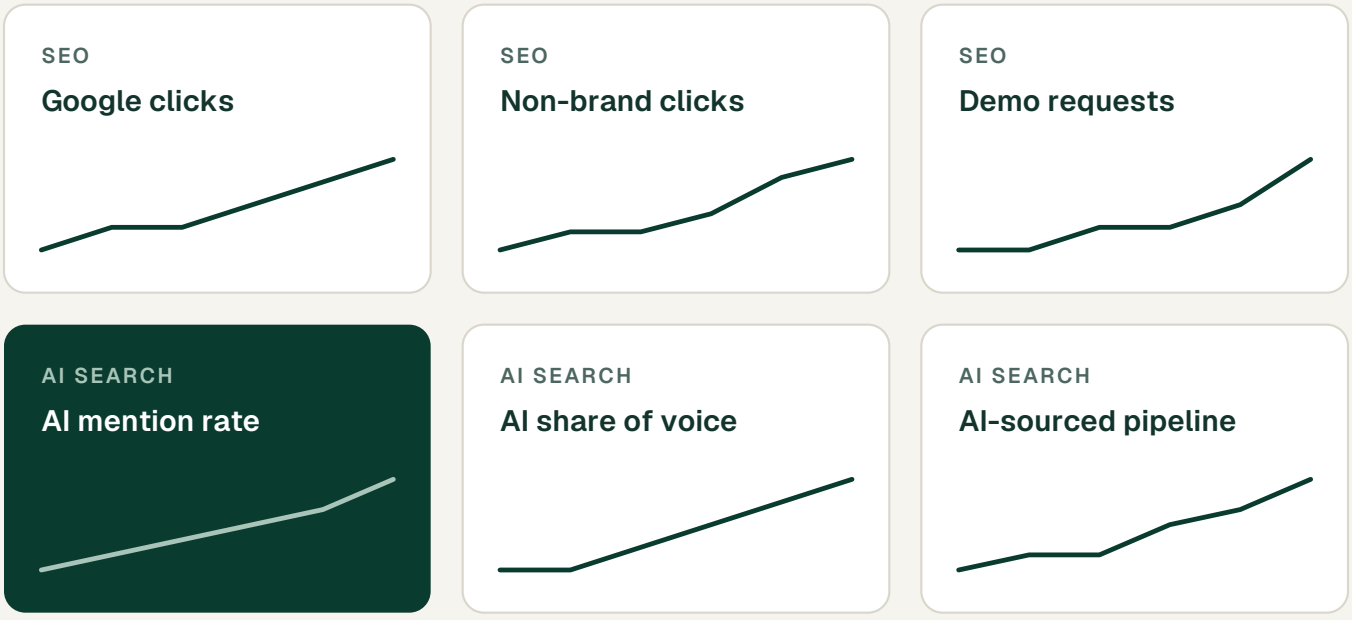


Illustration. Your trends draw from your own monthly data in the spreadsheet.

How to use this template

A monthly report for SEO leads who report to a CMO. Classic SEO reports stop at traffic. This one puts SEO and AI search side by side and ends at demos and pipeline, the numbers a CMO is asked about in the board meeting.

1. **Fill the Data tab once a month** One row per month. Every KPI is defined on the KPI definitions tab with the exact report path in Search Console, GA4 or your CRM. Once the GA4 AI channel and the CRM fields exist, it is a short monthly job.
2. **Pick the month** On the Dashboard, choose the report month from the dropdown. This month, last month and the change calculate themselves, and the charts show the trend.
3. **Set up AI tracking first** GA4: since May 13, 2026 the default channel group has an AI Assistant channel; check it in Traffic acquisition. Optional: Admin > Data display > Channel groups > Create new channel group, add channel 'AI engines' with Source matches regex (on the KPI definitions tab), drag it above Referral, save. CRM: add 'How did you hear about us?' with an 'AI assistant (ChatGPT, Perplexity…)' option to every demo form.
4. **Write the story, not the numbers** Use the Wins and losses and Next month tabs. One line per item: what happened, which KPI it moved, what you do next. Copy the dashboard into the slide deck (.pptx) in this pack.
5. **Print or send** The Dashboard, KPI definitions and Wins and losses tabs each print on one page (File > Print). One file covers four report types: the Dashboard alone for leadership, Wins and losses plus KPI definitions for a ranking report, the SEO Audit's Technical tab for a technical report, and the deck for clients, with your logo in each slide's dashed 'Your logo here' box.
6. **Targets** No benchmarks are baked in. AI mention rate depends heavily on your category and prompt set, so set your own targets from your first month's baseline.
7. **Sample data** Butter cells are six months of sample data for a fictional B2B SaaS company. Overwrite them. A filled example of an AI visibility report: arobis.ai/sample-ai-visibility-report.

In the spreadsheet

Data one row per month, 22 KPIs.
Dashboard pick the month: this month, last month, change, three charts.
Engine breakdown AI sessions by engine and mention rate by engine.
KPI definitions every KPI defined, sourced and explained.
Wins and losses, Next month, Method note the story for the CMO.
Slide deck (.pptx) the same report as 10 slides.

In this PDF

Next page: a filled sample report. Then the KPI definitions, the tracking setup and the report layout to fill each month on screen or on paper.
Fillable: type into any box, click a circle or tick box, then save. Works in Acrobat, Preview, Chrome and Edge.
Printable: Letter size, portrait, clean margins.

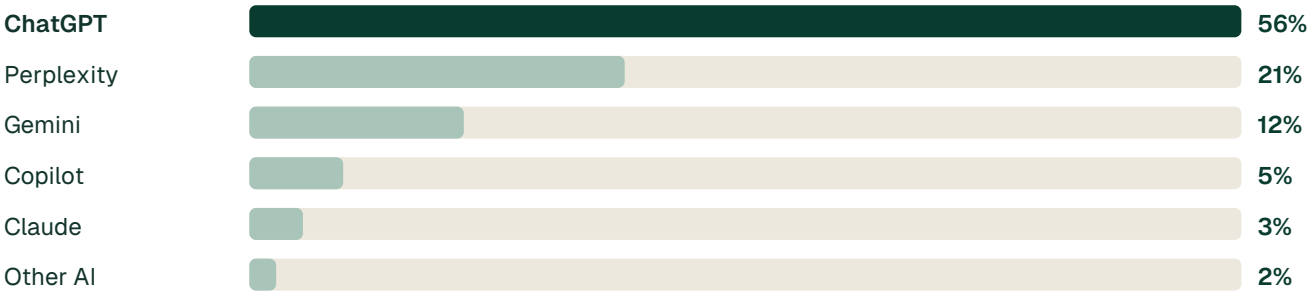
Sample filled report

Month 6 for a fictional B2B SaaS company. Every number on this page is sample data, there to show how a finished report reads.

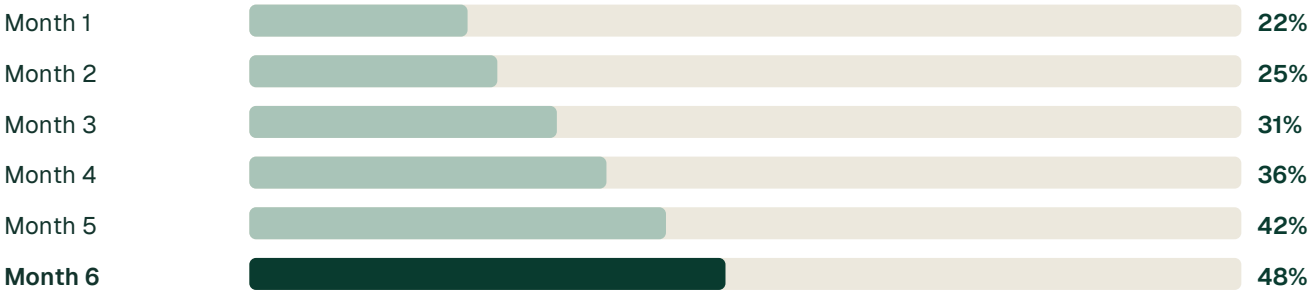
GOOGLE CLICKS	AI MENTION RATE	AI-SOURCED DEMOS	AI-SOURCED PIPELINE
2,460	**48%**	**7**	**$47,000**
+7% vs last month	+6 pts vs last month	+40% vs last month	+42% vs last month

- Non-brand Google clicks grew to 1,480 (+11%), led by a new comparison page reaching the top 3. Branded impressions rose to 12,300 (+10%).
- AI engines name the brand on 48% of buyer prompt runs, up from 22% in month 1. The one-month gain of 6 points is inside run-to-run noise. The six-month trend is not. Share of voice is 24%: still behind the category leader.
- AI-sourced demos rose from 5 to 7 and AI-sourced pipeline to $47,000. Next: alternatives pages and listicle placements.

AI-REFERRED SESSIONS BY ENGINE, MONTH 6 (SAMPLE, ROUNDED, SHARE OF 131)



AI MENTION RATE BY MONTH (SAMPLE)



22 KPIs: definition, source, story

Each number is defined once, pulled from one place, and comes with the sentence that explains a move to a CMO.

SEO KPIs

Google organic clicks

WHAT Clicks from Google Search to your site in the month.
WHERE Search Console > Performance > Search results > Search type: Web > Date: last month, compare to previous month. Google counts clicks from AI Overviews and AI Mode links in this total.
TO THE CMO Up with flat rankings usually means better titles or more pages ranking. Down with stable rankings usually means fewer searches or AI Overviews answering on the page: check impressions first.

Google impressions

WHAT Times any of your URLs appeared in Google results.
WHERE Same report, Impressions toggle on.
TO THE CMO The leading indicator. Impressions rise weeks before clicks when new pages start ranking on page 2 and 3.

Branded impressions (Google)

WHAT Google impressions from queries that contain your brand name: the demand you did not have to win in the results.
WHERE Search Console > Performance > + Add filter > Query > Custom (regex) > Matches regex: yourbrand|your brand|yourbrnd.
TO THE CMO Rising branded demand with flat AI referrals usually means engines are recommending you and buyers come back through Google. Show it next to AI mention rate.

Bing clicks

WHAT Clicks from Bing web search in the month.
WHERE Bing Webmaster Tools > Search Performance > Clicks, last month vs previous month.
TO THE CMO Bing is small on its own, but its index sits behind Copilot answers. A drop here is an early warning for Copilot visibility.

Non-brand clicks

WHAT Organic clicks from queries that do not contain your brand name.
WHERE Search Console > Performance > + Add filter > Query > Custom (regex) > Doesn't match regex: yourbrand|your brand|yourbrnd (add common misspellings).
TO THE CMO This is demand you won from people who did not know you. It is the number SEO is directly responsible for.

Non-brand keywords in top 10

WHAT Distinct non-brand queries with average position 10 or better in the month.
WHERE Search Console > Performance > Queries, apply the non-brand regex, count rows with Position 10 or less. The UI export stops at 1,000 rows: larger sites should use the Search Console Looker Studio connector or the Search Analytics for Sheets add-on. Or a rank tracker on a fixed keyword list.
TO THE CMO Breadth of visibility. A B2B SaaS client of ours went from 205 to 703 non-brand keywords in the Google top 10 in 90 days, and clicks followed.

Non-brand keywords in top 3

WHAT Same as above, average position 3 or better.
WHERE Same export, Position 3 or less.
TO THE CMO The top 3 is where most clicks go. Moving keywords from 4 to 10 into the top 3 is usually the fastest click gain.

New referring domains

WHAT Websites that linked to you for the first time this month, counted once per site however many links each one adds.
WHERE Ahrefs Webmaster Tools (free for sites you verify) > Site Explorer > Referring domains, history set to last month, New only. Search Console > Links > Top linking sites shows totals without dates: export it each month and compare with last month's export.
TO THE CMO Count sites, not links: a sitewide footer link is still one site. Note how many point at money pages. A month with none is worth a line in Wins and losses.

Index coverage (sitemap pages)

WHAT Pages in your XML sitemaps that Google reports as indexed, divided by all pages submitted in those sitemaps.
WHERE Search Console > Indexing > Pages, switch 'All known pages' to 'All submitted pages'. Indexed / (Indexed + Not indexed). The reasons sit under 'Why pages aren't indexed'.
TO THE CMO A page Google has not indexed cannot rank or appear in AI Overviews. A drop with no pages removed is a technical problem: open the reasons table before the next release.

Core Web Vitals: good URLs (mobile)

WHAT Share of your URLs that pass all three Core Web Vitals on mobile for real Chrome users: LCP 2.5 s or less, INP 200 ms or less, CLS 0.1 or less.
WHERE Search Console > Experience > Core Web Vitals > Mobile. Good / (Good + Needs improvement + Poor). Low-traffic sites may see 'Not enough usage data': test the money pages in PageSpeed Insights instead.
TO THE CMO The technical health line. Report it with the count of open P1 rows on the SEO Audit template's Fix list, so the CMO sees what is broken and who fixes it. A fall right after a release usually points at that release.

Organic sessions

WHAT GA4 sessions with Session default channel group = Organic Search.
WHERE GA4 > Reports > Acquisition > Traffic acquisition > Session default channel group = Organic Search.
TO THE CMO Should move with clicks. If clicks rise and sessions do not, check consent mode and tagging before celebrating.

Organic demo and trial requests

WHAT Demo or trial forms submitted in sessions from Organic Search.
WHERE GA4 > Traffic acquisition > Key events column filtered to your demo and trial key events. Cross-check with CRM lead source = Organic.
TO THE CMO The number the board cares about. Report it next to sessions so the conversion rate is visible.

Organic-sourced pipeline ($)

WHAT Value of opportunities created this month whose first touch was organic search.
WHERE CRM (HubSpot: Original source = Organic search; Salesforce: Lead Source = Organic), opportunities created in the month, sum of amount.
TO THE CMO Lagging but decisive. Expect it to trail sessions by one sales cycle.

AI search KPIs

AI mention rate

WHAT Share of buyer prompt runs where an AI engine names your brand.
WHERE One source only: the AI prompt test in the SEO Audit template (20 prompts x 5 engines x 3 runs), same wording every month. Mention rate = runs naming you / runs completed.
TO THE CMO The AI version of ranking. At 300 runs, treat a move under about 11 points as noise (2.8 x sqrt(2 x p x (1 - p) / runs)); report the three-month trend. A B2B SaaS client of ours moved from 5 of 25 to 19 of 25 money prompts naming it in 90 days.

AI share of voice

WHAT Your brand mentions divided by all tracked brand mentions across the prompt set.
WHERE One source only: the Competitor Analysis template > Share of voice tab (25 prompts x 5 engines x 1 run).
TO THE CMO Mention rate can rise for everyone in a category. Share of voice tells you if you are winning against the brands you lose deals to. Share of voice rests on 125 answers (25 prompts x 5 engines x 1 run): a move under about 15 points can be noise, so read it as a quarter-over-quarter trend.

Citation share

WHAT Citation share = prompts where any run cites your domain / 20 prompts. It moves in 5-point steps.
WHERE The same AI prompt test as mention rate: Cited column, prompts with a cited run divided by the 20 prompts.
TO THE CMO Mentions build awareness, citations send visitors. Citation share rests on 20 prompts: one prompt is 5 points and a move under about 35 points can be noise, so report it as a quarter-over-quarter trend. The same B2B SaaS client reached 45% of tracked AI answers citing its website.

AI feature impressions (Google)

WHAT Impressions of your pages in Google's AI features (AI Overviews, AI Mode) in the month.
WHERE Search Console > Performance > Generative AI report, impressions for the month. It shows impressions, pages, countries and devices: no clicks, no queries.
TO THE CMO The one number Google gives for its AI features. Rising impressions with flat Google clicks means the answer is being read on Google's page, not on yours.

AI citations (Bing)

WHAT Citations of your pages in Copilot, AI summaries in Bing and select partners in the month.
WHERE Bing Webmaster Tools > AI Performance, citations for the month.
TO THE CMO A first-party report that counts AI citations, so it is the cleanest Copilot signal you get.

Machine-style query impressions

WHAT Search Console impressions from queries that read like a prompt written for a model: six words or more, often an instruction or a line break. They almost never click.
WHERE Search Console > Performance > + Add filter > Query > Custom (regex) > Matches regex: ^(\S+\s+){5,}\S+ (six words or more). Note impressions and clicks. Method: arobis.ai/blog/google-search-console-ai-search-queries.
TO THE CMO Report them as their own row so they do not drag your CTR down. A rising count means AI tools are querying Google on your topic.

AI-referred sessions

WHAT GA4 sessions whose source is an AI assistant (ChatGPT, Perplexity, Gemini, Copilot, Claude and others).
WHERE GA4 > Reports > Acquisition > Traffic acquisition, Session default channel group = AI Assistant (default since May 13, 2026). Optional: a custom 'AI engines' channel above Referral (regex below) for assistants the default misses.
TO THE CMO Small numbers, high intent. Clicks from Google AI Overviews and AI Mode are counted as Google organic, not here, and some Gemini and ChatGPT app visits arrive with no referrer and land in Direct.

AI-sourced demos

WHAT Demo or trial requests where the session source was an AI engine or the buyer wrote an AI assistant in 'How did you hear about us?'.
WHERE GA4 key events on the AI Assistant channel (or your custom AI engines group) plus CRM self-reported source. Deduplicate by email.
TO THE CMO GA4 undercounts AI influence because many buyers read the answer and then search your brand. The self-reported field catches those.

AI-sourced pipeline ($)

WHAT Value of opportunities created this month from AI-sourced demos.
WHERE CRM report: opportunities whose contact has first-touch AI referrer or self-reported AI source.
TO THE CMO The number that turns AI search from a curiosity into a budget line. One client reported +31% qualified pipeline from AI engines this way.

Set up AI tracking once

GA4 now files recognized AI assistants under its own AI Assistant channel. The custom group below catches the rest; the two CRM fields catch the buyers who never click.

1. **Check the default first** Since May 13, 2026 GA4's default channel group has an AI Assistant channel. Reports > Acquisition > Traffic acquisition, Session default channel group: look for the AI Assistant row. AI Overviews and AI Mode stay in Organic Search.
2. **Optional: a custom AI engines channel** For assistants the default misses (they land in Referral): Admin > Data display > Channel groups > Create new channel group 'Channels with AI' > Add new channel 'AI engines' > Source matches regex > paste the regex below > Save.
3. **Order matters** Drag 'AI engines' above Referral, then save the group. GA4 assigns each session to the first channel it matches.
4. **Report on it** Reports > Acquisition > Traffic acquisition > switch the dimension to your new channel group. For engine detail, Explore > Free form, rows = Session source, filter channel = AI Assistant or AI engines.
5. **CRM fields** Add 'How did you hear about us?' to every demo and trial form with an 'AI assistant (ChatGPT, Perplexity, Gemini…)' option, plus a hidden first-touch source field.

GA4 > Source matches regex (split at | for print)

```
.*(chatgpt\.com|openai\.com|perplexity|gemini\.google|copilot\.microsoft|
  copilot\.com|edgeservices\.bing\.com|claude\.ai|deepseek|meta\.ai|you\.com|
  grok\.com|mistral\.ai).*
```

Copy the regex from the spreadsheet (KPI definitions tab), not from this PDF: line breaks pasted into GA4 make the condition fail silently. The leading and trailing .* make it work whether GA4 applies a full or a partial match. Clicks from Google AI Overviews and AI Mode arrive as google / organic, and some Gemini and ChatGPT app visits arrive with no referrer and land in Direct.

CRM fields to add

Field	Type	Values	Where
How did you hear about us?	Picklist, required	Google search; ChatGPT or another AI assistant; LinkedIn; Colleague or referral; Event; Other (free text)	Demo and trial forms
First-touch source	Hidden field	utm_source on the first visit, or the referrer domain if there is no UTM	Every form, stored on the contact
AI-sourced (flag)	CRM formula or workflow	True when first-touch source matches the GA4 regex above or the picklist says AI assistant	Contact and deal

Check the setup

- ☐ Open chatgpt.com, search your brand, click your link: Realtime shows chatgpt.com as the session source within minutes. The AI Assistant (or AI engines) row appears in Traffic acquisition within 24 to 48 hours.
- ☐ Submit a test demo request choosing 'ChatGPT or another AI assistant': the contact shows AI-sourced = true in the CRM.
- ☐ After a week, Traffic acquisition shows AI visits as their own row, and no assistant you track sits in Referral.

Month 1 checklist

Month 1 is the baseline every later month is compared with. Do these once, in this order.

- ☐ Week 1, before any fix ships: run the 20-prompt AI test from the SEO Audit template (300 runs) and the 25-prompt grid from the Competitor Analysis template. Their numbers are month 1 on the Data tab.
- ☐ Week 2: the AI tracking above is live (GA4 channel checked, CRM fields on every demo and trial form) and the three setup checks pass.
- ☐ Month end: pull the 13 SEO KPIs from Search Console (Web, calendar month), Ahrefs Webmaster Tools, GA4 and the CRM into the month 1 row.
- ☐ Set your targets from the month 1 numbers. No benchmark is baked in.
- ☐ Write any tracking change in the Method note's 'Changes this month' line, so later trends stay honest.
- ☐ Print the Dashboard tab (one page) and send it with three sentences: what moved, why, what happens next.

Monthly report

REPORT LAYOUT

Fill these pages each month, on screen or on paper. Same order every month, so the CMO knows where to look.

COMPANY | REPORT MONTH | PREPARED BY

Executive summary

GOOGLE CLICKS	AI MENTION RATE	AI-SOURCED DEMOS	AI-SOURCED PIPELINE
vs last month	vs last month	vs last month	vs last month
SAMPLE 2,460, +7%	**SAMPLE** 48%, +6 pts	**SAMPLE** 7, +40%	**SAMPLE** $47,000, +42%

Three sentences the CMO can repeat: what moved, why, what happens next.
SAMPLE Non-brand Google clicks grew to 1,480 (+11%), led by a new comparison page reaching the top 3.

Decisions needed from the CMO this month

SEO and AI search KPIs

This month, last month, change. Add one line of context only where a number moved. The butter column is the month 6 sample.

KPI	Sample	This month	Last month	Change	Context
SEO KPIs					
Google organic clicks	2,460				
Google impressions	103,400				
Branded impressions (Google)	12,300				
Bing clicks	188				
Non-brand clicks	1,480				
Non-brand keywords in top 10	505				
Non-brand keywords in top 3	118				
New referring domains	15				
Index coverage (sitemap pages)	93%				
Core Web Vitals: good URLs (mobile)	81%				
Organic sessions	3,020				
Organic demo and trial requests	34				
Organic-sourced pipeline ($)	$137,000				
AI SEARCH KPIs					
AI mention rate	48%				
AI share of voice	24%				
Citation share	25%				
AI feature impressions (Google)	7,400				
AI citations (Bing)	38				
Machine-style query impressions	5,600				
AI-referred sessions	131				
AI-sourced demos	7				
AI-sourced pipeline ($)	$47,000				

Engine breakdown

AI-referred sessions come from GA4 (any assistant that sends a referrer). Mention rate comes from the prompt test, which runs five engines. Per engine each rate rests on 60 runs, so only gaps of about 25 points are real.

Engine (GA4 source)	Sample	AI-referred sessions
ChatGPT	74	
Perplexity	28	
Gemini	16	
Copilot	7	
Claude	4	
Other AI	2	

Engine (prompt test)	Sample	Mention rate
ChatGPT	54%	
Gemini	46%	
Perplexity	58%	
AI Overviews	40%	
Copilot	42%	

Wins and losses

	What happened	KPI it moved	What we do next
SAMPLE Win	New comparison page vs top rival reached the top 3 for 'brand vs rival'	Clicks, AI mention on P11	Build the next two comparison pages
◯ Win ◯ Loss			
◯ Win ◯ Loss			
◯ Win ◯ Loss			
◯ Win ◯ Loss			

Four flags to check every month

Flag (house rule, change it)	Where to find it	Sample	This month
Striking distance: queries at average position 11 to 20 with 100+ impressions	Search Console > Performance > Queries, filter Position greater than 10 and smaller than 21, Impressions greater than 99	14	
CTR under half your site's average at the same position	Export queries, compare each query's CTR with your site average for its position band (1 to 3, 4 to 10)	3	
Money page clicks down 20% or more month over month	Search Console > Performance > Pages, compare last month with the previous month, money page URLs only	1	
A core prompt that named you last month and does not now	SEO Audit template > AI prompt test, this month's run next to last month's	2	

Any flag above zero gets a line in Wins and losses.

Next month

Action	Owner	KPI it should move	Done
SAMPLE Publish /compare/brand-vs-rival-b and /alternatives/rival-a	PMM	Mention rate on X vs Y and Alternatives prompts	
			☐
			☐
			☐
			☐
			☐

Method note

Mention rate, citation share	SEO Audit AI prompt test: 20 buyer prompts x 5 engines x 3 runs in clean sessions, on three different days in one week. Identical wording every month. Citation share = prompts where any run cites your domain / 20 prompts.
Noise	At 300 runs, treat a move under about 11 points as noise: 2.8 x sqrt(2 x p x (1 - p) / runs). Per engine (60 runs) only gaps of about 25 points are real. Citation share rests on 20 prompts: one prompt is 5 points and a move under about 35 points can be noise. Share of voice rests on 125 answers (25 prompts x 5 engines x 1 run): a move under about 15 points can be noise. Report all three as a quarter-over-quarter trend.
Share of voice	Competitor Analysis grid: 25 buyer prompts across 9 stages x 5 engines x 1 run, every brand's position recorded.
Engines	ChatGPT (search on), Gemini, Perplexity, Google AI Overviews, Microsoft Copilot. Claude is not in the free method; add it as a sixth engine if your buyers use it. Google AI Mode: add it the same way (logged out, US, new session); AI Mode clicks also count in Search Console Web. The full Arobis AI Visibility Audit tests ChatGPT, Gemini, Claude and Perplexity.
Mention	Brand named anywhere in the answer. Position = order of first mention.
Citation	A link to your domain in the answer's sources or citations.
Search data	Google Search Console, Web search type, calendar month, compared with the previous month.
Analytics	GA4 default AI Assistant channel plus a custom 'AI engines' group for assistants it misses (regex in the setup notes). AI Overview and AI Mode clicks count as Google organic.
Pipeline	CRM opportunities created in the month, by first-touch source plus self-reported source.
Changes this month	

Is the move real?

Every threshold comes from 2.8 x sqrt(2 x p x (1 - p) / n), with n the runs or prompts behind the number. Report the quarter trend, not the one-month move.

Number	Base	A move is noise under	Sample month 6	This month
Mention rate	300 runs	about 11 points (at 48%)	+6 this month: noise. +26 since month 1: real.	
One engine	60 runs	about 25 points	Widest gap 18 points (Perplexity 58%, AI Overviews 40%): not yet real.	
Citation share	20 prompts	about 35 to 38 points (at 20 to 25%)	+5 this month: one prompt. +20 since month 1: still inside noise, read it next quarter.	
Share of voice	125 answers	about 15 points (at 24%)	+4 this month: noise. +15 since month 1: at the line, read it next quarter.	

AROBIS AI

Want us to run this for you?

Arobis AI is the AI Search Demand Generation agency for B2B SaaS. We run these templates on your site, your competitors and your buyers' prompts, then do the work that moves the numbers.

We run all five templates on your site, competitors and buyer prompts, then do the work.

AI visibility for SaaS
arobis.ai/ai-visibility-for-saas

AI visibility audit
arobis.ai/ai-visibility-audit

Free AI visibility checker
arobis.ai/ai-visibility-checker

Pricing
arobis.ai/pricing