FREE PLAYBOOK · 2026 EDITION

The AEO & GEO Playbook for B2B

How to get your company cited by ChatGPT, Perplexity, Gemini and Google AI Overviews, in 90 days.

01 Why AI answers now decide your shortlist

02 The 30-prompt AI visibility audit

03 The answer-first page template

04 Schema and technical checklist

05 Entity and off-site citation plan

06 The 90-day rollout plan

07 How to measure AI visibility

Inboundweb

Digital Solutions That Deliver Results

01 Why AI answers now decide your shortlist

Your buyers ask ChatGPT for a shortlist before they ever visit your website. If you aren't in the answer, you aren't in the deal.

Figure	What it means	Source
50%	of B2B software buyers now start their research in an AI chatbot rather than Google; 74% of them use ChatGPT	G2 buyer survey, 2026
89%	of B2B buyers used generative AI in at least one phase of their purchase	Forrester, 2024
~25%	of Google searches now trigger an AI Overview	Conductor, 2026
87%	of AI referral traffic comes from ChatGPT	Conductor Q1 2026
44%	of ChatGPT citations come from the first 30% of a page	Kevin Indig & Gauge, 2026
6.5×	more likely to be mentioned via third-party sources than your own site	AirOps, 2025
+41%	visibility lift from adding stats, quotes and citations	GEO-BENCH, 2024

Figures compiled by Elite Content Marketer, "59 Generative Engine Optimization Statistics (2026)".

AEO vs GEO vs SEO in one line each

- ☐ **SEO:** rank pages and win clicks in Google and Bing.
- ☐ **AEO:** be the answer an engine quotes, in AI Overviews, snippets and chat.
- ☐ **GEO:** be the brand AI models recommend, across every source they read.

02 The 30-prompt AI visibility audit

Build a fixed prompt set, test it in four engines, and score it the same way every month. That's your baseline.

Step 1: write 30 prompts across three intents

Intent	Count	Example prompts
Category / shortlist	10	"Best HubSpot partners for B2B SaaS" · "Top white-label Webflow agencies"
Problem / how-to	12	"How do I migrate from Salesforce to HubSpot?" · "How much does HubSpot implementation cost?"
Brand / comparison	8	"Is [your company] good?" · "[You] vs [competitor]"

Step 2: test in ChatGPT, Perplexity, Gemini and Google AI Overviews

Use a logged-out or fresh session. Record the full answer and every cited URL.

Step 3: score each prompt

Score	Meaning
3	Named and your page is cited as a source
2	Named, but a third-party page is cited
1	Not named, but your page is cited
0	Absent; competitors named instead

Your total (max 360 = 30 prompts × 4 engines × 3)

Top competitor total

> **Also record:** which third-party domains are cited most for your category (directories, "best of" lists, Reddit, review sites). Those are your off-site targets in section 05.

03 The answer-first page template

Every page you want cited follows the same anatomy. Engines lift clear, self-contained answers.

Block	Rule
H1	Matches the question buyers ask, in their words
Short answer	First 40–60 words answer it directly, with one number
Key takeaways	3–5 bullets a reader (or engine) can quote
Question H2s	5+ sections, each opening with a 40–60 word direct answer
Proof	3+ statistics with named sources, plus first-hand data (projects, timelines, results)
Table	At least one comparison, pricing or checklist table
Internal links	Link to the service page in the first third; 2 sibling articles
FAQ	5 questions with 1–3 sentence answers, marked up as FAQPage
Author + dates	Named expert byline, bio, published and last-updated dates
Freshness	Review every 90 days; update numbers and the "last updated" date

Before and after: the first paragraph

Before
"In today's fast-paced digital landscape, choosing the right CRM partner can be challenging. In this article we'll explore..."

After (illustrative)
"HubSpot implementation typically costs $5,000–$30,000 with a partner and takes 6–12 weeks. Cost depends on hubs, data migration and integrations. Here's how each one changes the budget."

04 Schema and technical checklist

Structured data and crawl access tell engines who you are, what a page answers and how fresh it is.

Schema (JSON-LD)

- [ ] Organization on every page: name, logo, founding date, sameAs profiles
- [ ] WebSite + BreadcrumbList sitewide
- [ ] BlogPosting on articles: author (Person), datePublished, dateModified, image
- [ ] FAQPage wherever a visible FAQ exists
- [ ] Service on each service page with areaServed
- [ ] Person schema for authors with credentials
- [ ] Review / AggregateRating only where reviews are visible

Crawl and render

- [ ] robots.txt allows GPTBot, OAI-SearchBot, PerplexityBot, ClaudeBot, Google-Extended (unless you choose otherwise)
- [ ] llms.txt at the root summarising services and key pages
- [ ] Key content in HTML, not hidden behind tabs or scripts
- [ ] XML sitemap with lastmod dates
- [ ] Core Web Vitals pass on mobile
- [ ] Bing Webmaster Tools verified (feeds ChatGPT search and Copilot)
- [ ] No thin or duplicate pages diluting topics

Quick test: paste a URL into Google's Rich Results Test and Schema.org's validator after every template change.

05 Entity and off-site citation plan

AI models trust what many sources agree on. Make your facts consistent everywhere, then get named where engines already look.

Entity consistency: one fact sheet, everywhere

Fact	Where it must match
Company name, founding year, HQ	Website, LinkedIn, Google Business Profile, Crunchbase, Clutch, G2
Services and platforms	Service pages, partner directories (HubSpot, Webflow, Shopify), LinkedIn
Proof numbers (projects, clients, certifications)	Homepage, About, schema, proposals, directory profiles
Leadership names and titles	About page, Person schema, LinkedIn

Off-site citation targets

- [ ] "Best X" and comparison articles already cited for your prompts (from your audit)
- [ ] Review platforms: Clutch, G2, DesignRush; ask 5 clients a month for reviews
- [ ] Partner directories: HubSpot Ecosystem, Webflow Experts, Shopify Partners
- [ ] Communities: relevant subreddits, HubSpot Community, Slack groups (answer, don't pitch)
- [ ] Podcasts, guest posts and data studies that others will quote
- [ ] LinkedIn posts from your founder, linking back to flagship articles

06 The 90-day rollout plan

Three 30-day sprints. Each ends with a re-run of your prompt audit.

Sprint	Focus	Deliverables
Days 1–30 Foundation	Baseline and technical fixes	30-prompt audit · Organization, BlogPosting, FAQPage and Breadcrumb schema · robots.txt and llms.txt · retire or merge thin pages · entity fact sheet
Days 31–60 Content	Answer-first pages for your highest-value prompts	Rewrite 5 service pages to the template · publish 6–8 answer-first articles · add FAQs to top 20 pages · refresh dates
Days 61–90 Authority	Third-party mentions	Pitch 10 "best of" list owners · 10 new reviews · 3 guest posts or podcasts · founder LinkedIn series · re-run audit and compare

Weekly operating rhythm

- [ ] Monday: pick 2 prompts to target this week
- [ ] Tuesday–Thursday: draft, review and publish 2 answer-first pieces
- [ ] Friday: one off-site action (review request, pitch, community answer)
- [ ] Monthly: re-run the 30-prompt audit and update the scorecard

07 How to measure AI visibility

Track a few metrics consistently. AI answers vary run to run, so trends matter more than any single result.

Metric	How to measure	Cadence
Prompt coverage	% of your 30 prompts where you're named, per engine	Monthly
Citation rate	% of prompts where your URL is cited	Monthly
Share of AI voice	Your score ÷ (your score + top 3 competitors)	Monthly
AI referral traffic	GA4 sessions from chatgpt.com, perplexity.ai, gemini.google.com, copilot.microsoft.com	Weekly
AI-sourced leads	Add "How did you hear about us?" with an "AI assistant" option; tag in CRM	Monthly
Crawler activity	Server or CDN logs for GPTBot, PerplexityBot, ClaudeBot	Monthly

Set expectations honestly. No one can guarantee placement in ChatGPT. Technical fixes can show up within weeks of a re-crawl; consistent citation gains usually take 3–6 months.

Your scorecard

Month	Coverage	Citation rate	Share of voice	AI sessions	AI leads
Baseline					
Day 30					
Day 60					
Day 90					

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Want us to run your AI visibility audit?

Inbound WebHub runs the 30-prompt audit, fixes schema and publishes answer-first content directly in HubSpot, Webflow, WordPress or Shopify, for B2B companies and white-label for agencies.

1,100+ projects since 2017 · 30+ certified specialists · ISO 27001 · CMMI Level 3

Book a call → inboundwebhub.com/contact-us

Further reading at inboundwebhub.com/blog: White Label AEO Services · HubSpot Agent Hub · Webflow SEO Checklist

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