

**A/GEO.**

FIELD PLAYBOOK 2026 EDITION

# AI Visibility Engineering Playbook

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For Forward Deployed Marketing Engineers and AI Search Growth Marketers

## **Check. Fix. Publish. Track.**

A practical operating system for making a business easier to find, understand, cite, recommend and choose in AI-assisted discovery.

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## NAVIGATION

# Contents

|                                                                 |    |
|-----------------------------------------------------------------|----|
| <b>Build the conditions for visibility</b>                      | 4  |
| <b>Operating model</b>                                          | 6  |
| Workstream 1 AI Visibility Intelligence and Measurement         | 9  |
| Workstream 2 Query Fan-Out and Buyer-Intent Engineering         | 11 |
| Workstream 3 Technical Discoverability and Retrieval            | 14 |
| Workstream 4 Entity Brand Knowledge and Information Consistency | 16 |
| Workstream 5 Structured Data and Schema Engineering             | 19 |
| Workstream 6 Competitive and Citation Source Intelligence       | 21 |
| Workstream 7 Information Architecture and Internal Linking      | 23 |
| Workstream 8 Content Portfolio and Answer Engineering           | 25 |
| Workstream 9 Expertise Evidence and Information Gain            | 27 |
| Workstream 10 Citation Earning Digital PR and Authority         | 29 |

NAVIGATION CONTINUED

Contents

Workstream 11 Reputation Reviews Listings and Community Presence 31

Workstream 12 Local International Commerce and Vertical Data 33

Workstream 13 Multimodal and Agentic Experience Readiness 35

Workstream 14 Experimentation Deployment QA and Change Management 37

Workstream 15 Conversion Analytics Attribution and Revenue 40

Workstream 16 Program Governance Risk and Continuous Improvement 42

**Measurement framework 44**

**Ninety day field plan 47**

**Template library 49**

**Field checklists 65**

**Operator implementation appendix 67**

**Glossary 87**

**Primary sources and standards 89**

## HOW TO USE THIS BOOK

## Build the conditions for visibility

This playbook turns sixteen AI Visibility Engineering workstreams into repeatable field procedures. Use it to launch a 90-day deployment, operate an ongoing growth program, or diagnose a specific visibility gap. Each workstream defines the inputs, procedure, quality gate, deliverables, measurement and handoff needed to move from an observed problem to a verified release.

A/GEO Agency treats AI visibility as the foundation of AI-enabled growth. The work begins with a simple question: can the right systems retrieve accurate, useful and well-supported information about the business? It ends with a harder one: did that visibility contribute to qualified demand, pipeline or revenue?

### The operating stance

- Engineer the conditions for discovery and selection. Do not promise inclusion, ranking, citation or recommendation.
- Treat answer-engine observations as samples from changing systems. Preserve the prompt, engine, market, date, environment and raw response.
- Separate platform requirements from observed correlations and A/GEO hypotheses.
- Prefer a corrected or expanded existing page to a thin new page created for one prompt variation.
- Connect every visibility metric to a buyer journey, a business outcome or a specific operational risk.

### Platform note

Google states that its AI search features rely on foundational search eligibility and do not require special AI schema or a special machine-readable file. OpenAI documents separate controls for search discovery, model training and user-triggered retrieval. These policies change. Verify current first-party documentation before modifying crawler access, preview controls, schema or measurement logic.

### Maturity ladder

| Level | State          | Evidence                                                                           |
|-------|----------------|------------------------------------------------------------------------------------|
| M0    | Uninstrumented | No fixed prompt set, baseline, owner or metric definitions                         |
| M1    | Observable     | Prompt cohorts, raw run records and a baseline scorecard exist                     |
| M2    | Retrievable    | Priority facts and pages are accessible, consistent and structured                 |
| M3    | Citable        | Distinct evidence, answer-ready assets and external corroboration exist            |
| M4    | Compounding    | Experiments, conversion data, pipeline linkage and governance operate continuously |

# AI Visibility Engineering operating system

Sixteen connected workstreams move a brand from observation to measurable growth.

|                               |                                |                                |                               |                                  |
|-------------------------------|--------------------------------|--------------------------------|-------------------------------|----------------------------------|
| 01<br>INTELLIGENCE            | 01<br>Visibility intelligence  | 02<br>Query fan-out and intent | 06<br>Competitors and sources | 14<br>Experimentation and QA     |
| 02<br>RETRIEVAL AND KNOWLEDGE | 03<br>Technical retrieval      | 04<br>Entity and brand truth   | 05<br>Structured data         | 07<br>Information architecture   |
| 03<br>CONTENT AND AUTHORITY   | 08<br>Answer engineering       | 09<br>Evidence and expertise   | 10<br>Citation earning        | 11<br>Reputation and reviews     |
| 04<br>GROWTH AND CONTROL      | 12<br>Market and vertical data | 13<br>Multimodal readiness     | 15<br>Conversion and revenue  | 16<br>Governance and improvement |

A/GEO METHOD   CHECK   >   FIX   >   PUBLISH   >   TRACK

Figure 1 The sixteen-workstream operating system

## DELIVERY SYSTEM

# Operating model

The Forward Deployed Marketing Engineer owns the evidence trail from buyer question to published change and measured outcome. The role is hands-on: inspect the current state, convert findings into tickets and briefs, coordinate specialists, verify releases and show what changed.

## The recurring loop

| Stage   | Primary question                                              | Exit condition                                                |
|---------|---------------------------------------------------------------|---------------------------------------------------------------|
| Check   | Where is the business absent, inaccurate or weakly supported? | A reproducible gap and its business value are documented      |
| Fix     | Which technical, entity or data blocker must be removed?      | The priority source of truth is correct and retrievable       |
| Publish | What useful evidence or asset should exist?                   | The asset is live, linked, reviewed and measurable            |
| Track   | Did the change affect visibility, behavior or demand?         | Matched observations are recorded and a next decision is made |

## Core roles

| Role                                | Accountability                                                                           |
|-------------------------------------|------------------------------------------------------------------------------------------|
| Forward Deployed Marketing Engineer | Owns the program, backlog, implementation coordination, QA, measurement and decision log |
| Client business owner               | Approves scope, priorities, commercial facts, risk decisions and budget                  |
| Subject-matter expert               | Supplies verifiable expertise, evidence, product facts and technical review              |
| Web or product engineer             | Implements templates, crawler controls, analytics, feeds, redirects and releases         |
| Content and communications          | Creates answer-ready assets, research, outreach and reputation responses                 |
| Analytics and revenue operations    | Maintains event definitions, CRM linkage, attribution and pipeline reconciliation        |
| Legal privacy and compliance        | Reviews regulated claims, data use, endorsements, licensing and material risk            |

## RACI by work type

| Work type                        | FDME | Business owner | Web | Content | Analytics | Legal |
|----------------------------------|------|----------------|-----|---------|-----------|-------|
| Prompt and source intelligence   | A/R  | C              | I   | C       | C         | I     |
| Crawler schema and IA            | A    | C              | R   | C       | C         | C     |
| Content and evidence             | A    | C              | C   | R       | I         | C     |
| Authority reputation and reviews | A    | C              | I   | R       | I         | C     |
| Measurement and attribution      | A    | I              | C   | I       | R         | C     |
| Risk and release approval        | R    | A              | C   | C       | C         | C     |

## Priority model

Score each backlog item from 1 to 5 for buyer value, visibility gap, evidence strength, reach and confidence. Score effort and risk from 1 to 5. Use the result to order work, then apply judgment for dependencies and compliance.

Priority score = (buyer value x visibility gap x reach x confidence) / (effort x risk)

## Program definition of done

- ☐ The change has an owner, business reason, source evidence and acceptance test.
- ☐ Visible content, structured data, profiles and feeds agree on material facts.
- ☐ The release passed functional, content, analytics and accessibility checks appropriate to its risk.
- ☐ The deployment date and affected URLs, templates or profiles are recorded.
- ☐ A matched measurement window and decision date are scheduled.
- ☐ The client has the artifact, credentials, operating notes and next action.

## SIXTEEN WORKSTREAMS

## Field procedures

Run the workstreams as one system. The numbered order is a useful deployment sequence, not a rigid waterfall. Start wherever the evidence shows the highest-value constraint, then preserve the handoff into adjacent workstreams.

## Workstream 1

# AI Visibility Intelligence and Measurement

## Outcome

Create a defensible view of where and how often the brand appears in AI answers, which sources influence those answers, and whether visibility produces qualified demand. The result is a trusted baseline, prioritized backlog, and cadence that separates movement from model variability.

## Scope and out of scope

**In scope:** answer-engine monitoring; prompt-set design; brand inclusion, prominence, sentiment, accuracy, and citation tracking; source and competitor analysis; organic referral and assisted-conversion instrumentation; experiment readouts; executive reporting.

**Out of scope:** treating a single model response as proof; promising deterministic rankings; attributing every unattributed visit to AI; measuring prompts with no relationship to the buyer journey; changing content before analytics and definitions are agreed.

## Triggers and prerequisites

Start at onboarding, before a major launch, after a material visibility change, and quarterly for recalibration. Confirm business goals, audiences, markets, products, competitors, approved claims, analytics ownership, and a decision-maker. Obtain guidance before storing sensitive prompt or customer data.

## Inputs and access

- AI visibility platform such as Profound, plus controlled manual checks where needed
- Web analytics, Search Console or equivalent, server logs, CRM, and conversion definitions
- Brand, product, audience, geography, and competitor lists
- Existing keyword research, content inventory, campaign calendar, and revenue stages
- Access to major answer experiences relevant to the audience, with locale and device variables documented

## Procedure

- 1. Prepare.** Write a measurement charter covering the decisions this work supports. Define markets, model surfaces, sampling frequency, reporting period, owners, and outcomes. Build a prompt registry with stable ID, wording, intent, persona, stage, location, product, and criteria. Record date, model, mode, account state, and location for controlled tests.
- 2. Diagnose.** Run the prompt set repeatedly enough to expose variance. Capture brand mention, recommendation position, citations, cited URL, sentiment, errors, competitors, and no-result states. Join this view to discovery, referral sessions, conversions, pipeline, and branded-search movement. Mark missing instrumentation and distinguish observation from inference.
- 3. Design.** Publish a metric dictionary and dashboard specification. Balance inclusion, first- and third-party citations, share of voice, accuracy, portrayal, source diversity, engagement, conversions, and pipeline. Establish fixed benchmark prompts for trends and rotating discovery prompts for emerging demand. Define sample sizes and change thresholds before declaring a win.
- 4. Implement.** Configure prompt tags, competitors, markets, alerts, and exports. Add channel groupings, events, conversion values, CRM source fields, and annotations. Keep raw observations separate from calculated metrics. Open owned, dated issues for factual errors, retrieval failures, and content or source gaps.
- 5. QA.** Test prompt deduplication, tag completeness, locale settings, citation resolution, URL normalization, and dashboard formulas. Manually reproduce a sample across platforms and compare it with the tool export. Confirm

that redirects and URL parameters do not split one citation into several records. Review restricted data, retention, and user access.

- 6. Measure.** Review alerts weekly, operating trends monthly, and strategy quarterly. Compare like-for-like prompt cohorts and show sample size and volatility alongside change. Segment gains by intent, persona, product, market, model, cited source, and content action. Link every experiment to a pre-change baseline and decision: scale, revise, hold, or stop.
- 7. Handoff.** Deliver a dashboard, metric dictionary, prompt registry, issue backlog, baseline memo, and recurring review agenda. Train the growth, content, PR, analytics, and product owners on what each metric can and cannot prove. Record the next calibration date and the person accountable for each data source.

## Operator checklist

- ☐ Business decisions and success thresholds are written before collection
- ☐ Benchmark prompts are stable; discovery prompts are separately labeled
- ☐ Locale, model, date, and test conditions are retained
- ☐ Citations resolve to normalized domains and URLs
- ☐ Visibility, accuracy, traffic, and business outcomes are all represented
- ☐ Manual validation agrees with sampled platform data
- ☐ Every reported change includes cohort, sample size, and comparison period
- ☐ Findings are converted into owned actions with dates

## Deliverables and Definition of Done

Deliver the charter, prompt registry, baseline dataset, dashboard, metric dictionary, alerts, insight memo, and backlog. Done means stakeholders can reproduce the baseline, trace headline metrics to observations, distinguish fluctuation from trend, and name the next action and owner for each material gap.

## KPIs

Coverage of priority prompts; brand inclusion rate; weighted share of voice; citation rate and diversity; factual accuracy; favorable or neutral portrayal; AI referral engagement; assisted conversion rate; sourced or influenced pipeline; issue resolution time; measurement completeness.

## Escalation triggers

Escalate when harmful or regulated misinformation appears; visibility falls beyond the agreed threshold for two comparable samples; tracking breaks; a major model or search-surface change invalidates the baseline; sensitive data enters monitoring; or executives request causal claims the evidence cannot support.

## Dependencies and risks controls

Dependencies include workstream 2 for the prompt universe, workstream 3 for retrievability, and analytics and CRM owners for outcomes. Control sampling bias with fixed cohorts, hallucinated causality with explicit attribution labels, tool drift with manual spot checks, and vanity reporting with pipeline-linked objectives.

## Miniature example

A payroll provider builds 120 prompts across three buyer roles. Its baseline shows strong educational mentions but weak vendor-comparison inclusion, with citations concentrated in two review sites. The team corrects outdated pricing facts, improves two comparison pages, and pursues one relevant industry guide. Six weeks later, it reports cohort-level inclusion, citations, and demo requests rather than favorable screenshots.

## Workstream 2

# Query Fan-Out and Buyer-Intent Engineering

## Outcome

Translate real buying decisions into a governed universe of questions, follow-up questions, criteria, entities, and evidence needs that an answer system may use to construct a response. The result tells the team what demand to monitor, what information to publish, and which third-party sources must corroborate the brand.

## Scope and out of scope

**In scope:** seed-query discovery; query fan-out; conversational follow-ups; persona and journey mapping; jobs, objections, comparisons, constraints, and local modifiers; prompt clustering; intent scoring; gap routing.

**Out of scope:** manufacturing high-volume keyword variations; claiming access to a model's private reasoning; treating search volume as the only measure of value; generating pages for every prompt; including prompts unrelated to a credible customer decision.

## Triggers and prerequisites

Run at onboarding, before content planning, when entering a market or launching an offer, and when monitoring reveals new questions or competitors. Confirm ideal customer profiles, products and exclusions, sales stages, purchase criteria, markets, regulated topics, and available customer evidence.

## Inputs and access

- Search queries, site search, sales calls, support tickets, reviews, communities, and research interviews
- AI visibility observations, autocomplete and related-question data, competitor coverage
- Product documentation, approved claims, pricing and packaging, customer-success evidence
- SME, sales, support, and customer access for validation

## Procedure

- 1. Prepare.** Define the decisions the query map must support and its boundary. Create a taxonomy for persona, job to be done, awareness level, funnel stage, topic, product, geography, urgency, risk, format, and evidence type. Give each query or prompt a stable ID and preserve natural customer language.
- 2. Diagnose.** Collect seed questions from first-party and market sources. Map fan-outs: definitions, causes, requirements, methods, alternatives, comparisons, criteria, cost, implementation, risk, proof, objections, compatibility, vendors, and next actions. Trace follow-ups such as "Which is best for a 200-person healthcare company?" Treat recurring subtopics and sources as observations, not hidden model logic.
- 3. Design.** Cluster prompts around a buyer decision, not shared words. Score business value, audience fit, evidence, visibility, difficulty, risk, and reuse. Separate stable benchmark prompts from evolving discovery prompts. Map each priority cluster to its intended answer, proof, format, conversion step, and corroborating sources.
- 4. Implement.** Load approved prompts and tags into monitoring. Map each need to an existing page, refresh, new page, tool, documentation, research, or earned coverage. Consolidate overlaps into authoritative assets. Route technical questions to product, proof gaps to customer marketing, and source gaps to PR.
- 5. QA.** Review the map with sales, support, product, and a subject expert. Remove ambiguous prompts, duplicates, irrelevant high-volume topics, and wording that leads the answer. Test a sample across locales and models. Confirm that regulated or high-stakes questions have the required reviewer and that every priority cluster has a credible evidence path.

- 6. Measure.** Track prompt coverage, answer inclusion, content engagement, assisted conversions, sales usage, and new demand signals by cluster. Review losing and winning prompts monthly. Refresh discovery clusters when customer language, product packaging, regulation, seasonality, or answer patterns change; preserve benchmark history.
- 7. Handoff.** Deliver the query universe, taxonomy, fan-out maps, scoring model, intent-to-asset matrix, and top-priority briefs. Train content owners to use cluster IDs in briefs and reporting. Assign a quarterly owner to add, retire, merge, or reclassify prompts with a logged reason.

## Operator checklist

- ☐ First-party customer language is represented
- ☐ Every seed includes criteria, alternatives, risk, proof, and next-step fan-outs where relevant
- ☐ Clusters map to decisions and journey stages
- ☐ Benchmark and discovery prompt sets are separated
- ☐ Priority scores include business value and evidence readiness
- ☐ Each priority cluster maps to one authoritative asset or action
- ☐ SMEs validate technical and regulated topics
- ☐ Duplicates and page-per-prompt recommendations are removed

## Deliverables and Definition of Done

Deliver the tagged registry, fan-out trees, intent map, scoring rubric, coverage matrix, backlog, and change log. Done means at least 90 percent of priority decisions have a monitored cluster, evidence need, content or source action, conversion path, and owner.

## KPIs

Priority-decision coverage; percentage of clusters with validated customer evidence; prompt-set precision; benchmark stability; high-priority content coverage; inclusion and citation rate by intent; qualified visits and conversions by cluster; sales-team usefulness rating; time from new signal to routed action.

## Escalation triggers

Escalate when stakeholders disagree on target customer or offer, customer research contradicts the strategy, a regulated query lacks expert review, no defensible evidence exists for a desired claim, prompt scope grows beyond capacity, or one model's wording is being treated as a universal buyer journey.

## Dependencies and risks controls

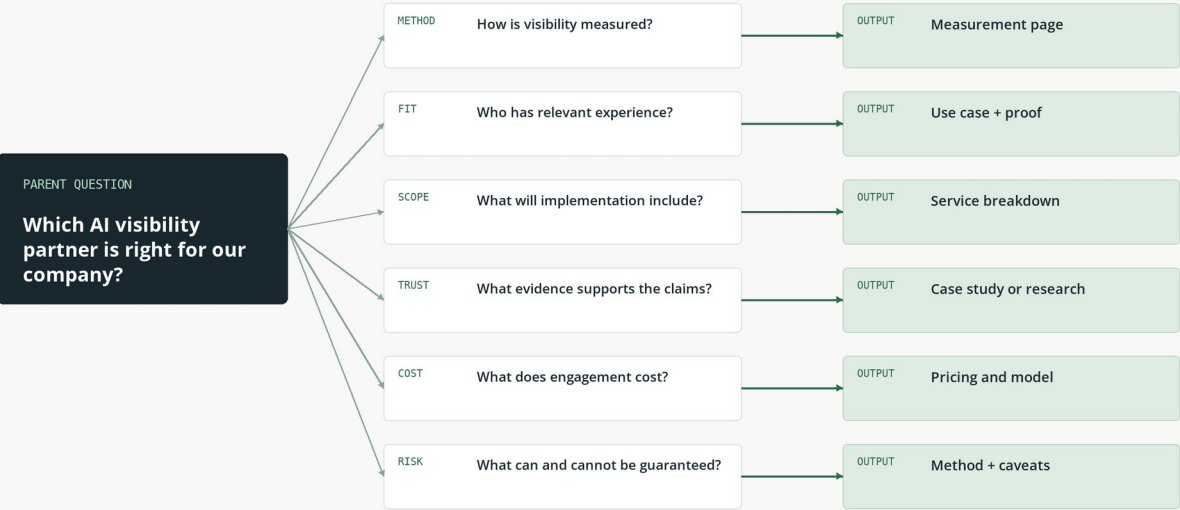
This work depends on workstream 1 measurement, product truth, and access to customer-facing teams. Control synthetic-demand bias by weighting first-party language, prompt explosion by clustering at the decision level, and content cannibalization by assigning one primary asset per intent with supporting links.

## Miniature example

For "best security training platform," the team fans out by company size, compliance framework, multilingual support, phishing simulations, time to deploy, reporting, price, integration, proof, and alternatives. Sales calls show that proof of behavior change matters more than course volume, so the cluster receives a higher-value research brief and customer evidence plan. The output is one strong evaluation guide and supporting proof assets, not 40 thin pages.

# From one buyer question to an evidence plan

Map likely subquestions, then decide what evidence and asset each one requires.



Decision rule: improve an existing page before creating a new one.

Figure 2 A buyer question fan-out mapped to evidence and assets

## Workstream 3

# Technical Discoverability and Retrieval

## Outcome

Ensure authoritative content can be crawled, rendered, indexed, fetched, and cited by the search and answer systems relevant to the business. The result is a fast, stable, observable retrieval layer with no accidental barriers between a verified answer and its source.

## Scope and out of scope

**In scope:** crawl controls, status codes, canonicalization, rendering, sitemaps and feeds, robots directives, bot and CDN behavior, JavaScript delivery, metadata, page performance, logs, content accessibility, redirects, and retrieval monitoring.

**Out of scope:** opening private data to crawlers; bypassing terms, access controls, or publisher policies; assuming llms.txt guarantees inclusion; optimizing only for named AI crawlers while search indexes remain broken; approving infrastructure changes without engineering and security owners.

## Triggers and prerequisites

Run during onboarding, migrations, redesigns, CMS or CDN changes, domain consolidation, international expansion, or a sudden citation or indexing decline. Require a production and staging inventory, release owner, rollback path, analytics access, log access, and security approval for crawler-policy changes.

## Inputs and access

- CMS, CDN or WAF, DNS, server logs, analytics, search engine consoles, and deployment pipeline
- URL inventory, templates, XML sitemaps, robots.txt, redirects, canonicals, hreflang, feeds, and structured data
- Desktop and mobile rendered pages, authenticated and anonymous states, supported user-agent tests
- Privacy, legal, security, and content-retention policies

## Procedure

- 1. Prepare.** Define which content should be public, indexed, retrievable, and cited. Create a URL and template inventory and record the intended status, canonical, indexability, language, owner, update frequency, and access policy. Identify answer-critical pages and set pre-change baselines for crawl, index, render, and response performance.
- 2. Diagnose.** Compare declared URLs with discovered, indexed, and log-requested URLs. Inspect robots rules, directives, status chains, canonicals, soft 404s, parameters, orphans, sitemaps, hreflang, and mobile parity. Render JavaScript templates. Check whether core text, links, dates, authors, and evidence appear in accessible HTML. Review WAF challenges, rate limits, blocks, timeouts, and origin errors.
- 3. Design.** Order remediation by impact and blast radius. Specify crawl path, canonical, status, rendering, sitemap membership, metadata, update signal, and monitoring by template. Prefer reliably rendered critical content. Treat llms.txt as an optional publisher aid, never a substitute for clean architecture, robots policy, sitemaps, and accessible pages.
- 4. Implement.** Fix unintended blocks, redirect chains, canonical and hreflang errors, broken links, invalid sitemaps, duplicate URLs, and inaccessible content. Put essential text and sources in semantic HTML. Configure caching, compression, response time, metadata, update signals, and feeds. Route crawler-access changes through security; never expose gated or personal information.
- 5. QA.** Test affected templates in staging and production with normal browsers, search inspection tools, direct HTTP requests, and approved user-agent simulations. Verify 200, 3xx, 4xx, and 5xx behavior; rendered content; canonical

and language signals; robots consistency; sitemap discovery; mobile parity; accessibility; and analytics. Re-crawl a representative sample and confirm rollback readiness.

**6. Measure.** Monitor valid indexed pages, crawl errors, response time, render completeness, bot success rates, sitemap freshness, canonical selection, citation resolution, and answer-critical page retrieval. Annotate releases, compare before and after, and alert on spikes in blocked or failed requests.

**7. Handoff.** Deliver the audit, prioritized ticket set, template specifications, crawler policy record, test evidence, monitoring dashboard, and incident runbook. Assign engineering owners and service targets. Add discoverability checks to release acceptance criteria.

## Operator checklist

- ☐ Public and private content boundaries are approved
- ☐ Priority templates return the intended status and canonical
- ☐ Essential content appears in accessible rendered HTML
- ☐ Robots, meta directives, headers, sitemaps, and canonicals agree
- ☐ No redirect loops, long chains, soft 404s, or accidental duplicates remain
- ☐ WAF and bot rules have security approval and log evidence
- ☐ Mobile, locale, and JavaScript states are tested
- ☐ Monitoring and rollback are active before release

## Deliverables and Definition of Done

Deliver a technical audit, URL and template inventory, remediation backlog, retrieval specification, crawler-policy matrix, QA evidence, monitoring dashboard, and incident runbook. Done means all priority content is publicly retrievable as intended, canonical and index signals are consistent, critical rendering is verified, material errors are resolved or accepted by an accountable owner, and regression alerts are live.

## KPIs

Priority URL retrieval success; valid index coverage; crawl and render error rate; median and tail response time; canonical consistency; sitemap freshness; orphan rate; bot 4xx and 5xx rate; citation-link resolution; regression detection and repair time.

## Escalation triggers

Escalate immediately for private-data exposure, a sitewide noindex or block, security challenges affecting legitimate retrieval, large index loss, migration redirect failure, sustained 5xx responses, legal uncertainty about crawler access, or a proposed change with no tested rollback.

## Dependencies and risks controls

This work depends on engineering, security, CMS ownership, and workstream 7 architecture. Control leakage with explicit public-content classification, crawler changes with approvals and staged rollout, duplicate creation with URL governance, and false confidence with live log and rendered-page checks.

## Miniature example

A software company has 60 useful integration pages, but their descriptions load only after a client-side API call and a WAF challenge blocks several non-browser requests. The team renders core descriptions and links in the initial HTML, revises the approved WAF rule, fixes sitemap omissions, and adds retrieval monitoring. It validates public exposure and normal browser behavior before measuring whether these pages begin appearing as citations.

## Workstream 4

# Entity Brand Knowledge and Information Consistency

## Outcome

Make the organization, people, products, locations, and relationships easy to identify and describe consistently across owned properties and credible external sources. The result is a governed source of truth that reduces ambiguity, outdated facts, entity confusion, and unsupported answer claims.

## Scope and out of scope

**In scope:** entity inventory and IDs; approved facts and claims; relationship mapping; canonical profiles; names, addresses, phones, URLs, founders, leadership, products, locations, credentials, dates, and sameAs targets; discrepancy management; change governance.

**Out of scope:** inventing notability; editing independent sources deceptively; creating fake profiles or reviews; forcing every source to use identical marketing language; asserting awards, leadership, pricing, or performance without evidence and approval.

## Triggers and prerequisites

Start during onboarding, rebranding, mergers, leadership or address changes, new product or location launches, and whenever answer monitoring reveals entity confusion. Establish a factual approver, legal reviewer where needed, and owners for corporate, product, people, and location data.

## Inputs and access

- Corporate records, product catalog, location data, leadership bios, credentials, approved claims, and change history
- Website, help center, newsroom, profiles, directories, maps, review sites, partner pages, and relevant knowledge bases
- Analytics and visibility observations showing ambiguous or inaccurate answers
- CMS, profile-administration, local-listing, and structured-data access

## Procedure

- 1. Prepare.** Create an entity registry with a permanent internal ID for each organization, brand, product, service, person, location, event, and research asset in scope. Assign an owner and approval source. Define the canonical name, aliases, entity type, description, URL, relationships, market status, effective date, and public or private classification.
- 2. Diagnose.** Audit owned and high-impact external sources. Check names, logos, descriptions, founding date, leadership, contacts, hours, locations, product status, pricing references, credentials, profiles, and parent-child relationships. Search for namesakes or merged profiles. Trace answer errors to possible public sources without assuming one cause.
- 3. Design.** Establish a canonical fact model and claim ledger. For each fact or claim, store wording, evidence, approver, valid-from date, review date, allowed contexts, and source URL. Design public entity pages that explain identity and relationships in plain language. Select authoritative sameAs references based on genuine ownership or identity, not link volume. Set a change-propagation sequence and service level.
- 4. Implement.** Correct owned profiles first: About, contact, location, product, leadership, media, policies, social profiles, and boilerplate. Feed the same governed facts into workstream 5 schema and reusable CMS components. Claim and update eligible directory or map profiles. Request factual corrections from independent publishers through

transparent channels; respect editorial control. Where a neutral knowledge base permits contributions, follow its disclosure, sourcing, and notability rules.

5. **QA.** Have the factual owner verify every sensitive field and claim. Test canonical URLs, aliases, redirects, contact paths, local hours, and relationship descriptions. Compare visible text with structured data. Sample major third-party profiles and answer outputs. Log sources that intentionally use different editorial wording but remain factually correct.
6. **Measure.** Track discrepancy count and age, correction acceptance, entity-confusion incidents, factual answer accuracy, profile completeness, local listing consistency, and time to propagate a change. Review high-risk facts monthly and the complete registry quarterly.
7. **Handoff.** Deliver the entity registry, claim ledger, relationship map, source inventory, correction log, governance policy, and change checklist. Train brand, PR, product, HR, local operations, and web teams to submit changes through one workflow. Name the approver and the distribution owner for every entity type.

## Operator checklist

- ☐ Each entity has a stable ID, owner, canonical URL, and approved description
- ☐ Aliases, namesakes, parent-child relationships, and status are explicit
- ☐ Every material claim has evidence, approver, and review date
- ☐ Owned pages, profiles, boilerplate, and schema agree on facts
- ☐ External corrections are transparent and source-compliant
- ☐ Sensitive or regulated statements receive the required review
- ☐ Change propagation is logged across every material surface
- ☐ Answer errors are retained as test cases

## Deliverables and Definition of Done

Deliver the entity registry, relationship graph, canonical fact sheet, claim ledger, discrepancy and correction logs, source inventory, and governance runbook. Done means all priority entities have approved facts and relationships, owned sources are consistent, material external discrepancies are corrected or actively tracked, answer-confusion test cases pass at the agreed rate, and a future change has a named propagation owner.

## KPIs

Owned-source consistency; high-impact external consistency; entity profile completeness; verified claim coverage; discrepancy backlog and median age; correction acceptance; factual answer accuracy; entity-confusion rate; change propagation time; local profile accuracy.

## Escalation triggers

Escalate for legal-name or ownership disputes, harmful identity confusion, impersonation, inaccurate regulated claims, changed facts still live past service level, disputed credentials, publisher requests for undisclosed influence, or edits that could violate an independent platform's rules.

## Dependencies and risks controls

Dependencies include legal and brand approval, workstream 5 schema, and PR and local-profile owners. Control stale facts with effective dates and reviews, overclaiming with a claim ledger, identity merging with stable IDs and aliases, and reputational risk with transparent correction practices.

## Miniature example

An agency shares a name with an unrelated software vendor, and answer systems sometimes combine their founders and services. The team creates distinct canonical profiles, clarifies the agency's legal name and service focus, aligns its website and verified profiles, adds supported entity relationships to schema, and requests corrections from two directories. The mistaken founder combination becomes a recurring accuracy test until it stays below the agreed threshold.

## Workstream 5

# Structured Data and Schema Engineering

## Outcome

Represent page meaning, entities, and relationships in valid, maintainable structured data that agrees with visible content. The result supports machine interpretation and eligible search features without treating markup as a visibility shortcut.

## Scope and out of scope

**In scope:** Schema.org and platform-supported markup selection; JSON-LD graph design; stable identifiers; template and CMS implementation; validation; eligibility checks; structured-data monitoring; migration and deprecation management.

**Out of scope:** marking up hidden claims; using inaccurate types; promising rich results or AI citations; chasing FAQ features; publishing ratings, authors, prices, availability, or credentials users cannot verify.

## Triggers and prerequisites

Run after the entity registry and page inventory exist, during new-template development, after content-model changes, and when validation or eligibility errors rise. Require an approved source for every populated field, CMS and engineering owners, template test coverage, and a release path with rollback.

## Inputs and access

- Workstream 4 entity registry, canonical facts, relationship map, and claim ledger
- Page and template inventory, content models, canonical URLs, breadcrumbs, authors, products, offers, media, and dates
- CMS, tag manager if approved, source repository, deployment pipeline, and validation tools
- Current Schema.org vocabulary and official feature documentation applicable to target search platforms

## Procedure

- 1. Prepare.** Inventory structured data by template and capture type, property, source field, generation method, owner, coverage, and known errors. Define goals for machine clarity and feature eligibility. Establish stable, canonical @id patterns for the organization and priority entities; do not mint a different identity on every page.
- 2. Diagnose.** Compare representative markup with visible text, canonicals, entity records, and platform requirements. Find invalid syntax, broken references, conflicting types, missing properties, duplicate graphs, stale values, and tag-manager races. Separate Schema.org validity, feature eligibility, and actual appearance.
- 3. Design.** Map schema by template. Use the most specific truthful type, such as Organization, WebPage, Article, Person, BreadcrumbList, Product, Offer, Service, LocalBusiness, Event, VideoObject, or Dataset. Connect nodes with stable @id references. Document sources, fallbacks, nulls, localization, lists, and governance. Include only real sameAs identities and supported claims.
- 4. Implement.** Generate JSON-LD from governed fields or templates. Reuse canonical nodes, escape data safely, and prevent empty or fabricated values. Align key properties with visible content. Test syntax, required fields, allowed values, canonical IDs, and template rules. Version the mapping and release through staging.
- 5. QA.** Validate raw JSON, Schema.org interpretation, and relevant platform eligibility on representative pages, including missing optional fields, multiple items, localization, pagination, and unpublished content. Inspect the rendered DOM to ensure the markup ships reliably. Confirm that structured data, open graph metadata, visible text, and the entity registry do not conflict. Re-test after caches clear and record warnings separately from blocking errors.

- 6. Measure.** Monitor valid-item coverage, error rate, warning trends, eligible impressions or enhancements where reported, entity consistency, and regression time. Track AI visibility alongside schema releases as a correlation only unless a controlled experiment supports a stronger claim. Review vocabulary and platform requirement changes quarterly.
- 7. Handoff.** Deliver the schema architecture, type-to-template matrix, property dictionary, @id registry, implementation notes, test suite, validation evidence, and monitoring runbook. Train content editors on which fields control public markup and how changes propagate. Assign engineering and content owners for each template.

## Operator checklist

- ☐ Every type accurately describes visible page content
- ☐ Priority entities use stable canonical `@id` values
- ☐ Property values come from governed sources with safe null handling
- ☐ Visible content, metadata, canonicals, and markup agree
- ☐ Syntax validity and feature eligibility are tested separately
- ☐ Locales, lists, missing values, and edge cases are covered
- ☐ Automated regression tests run before release
- ☐ Warnings, errors, owners, and accepted exceptions are logged

## Deliverables and Definition of Done

Deliver the audit, architecture, template matrix, property dictionary, ID registry, tickets, tests, validation report, and runbook. Done means priority templates emit truthful markup, stable relationships resolve, blocking errors are cleared, exceptions are documented, and monitoring detects drift.

## KPIs

Priority-template coverage; valid-item rate; blocking error rate; entity-ID consistency; content-to-markup discrepancy rate; eligible enhancement coverage; regression escape rate; mean time to repair; percentage of properties fed by governed fields rather than manual duplication.

## Escalation triggers

Escalate when markup exposes private data, misstates price or availability, includes unapproved medical, financial, legal, or performance claims, conflicts with visible content, creates widespread validation errors, depends on client-side execution that fails in production, or requires a type or feature no longer supported.

## Dependencies and risks controls

This work depends on workstream 4 entity governance, workstream 3 rendering, and workstream 7 page templates. Control spam risk with visible-content parity, stale values with governed CMS fields, identity fragmentation with stable IDs, and regressions with automated tests and production sampling.

## Miniature example

A services firm manually embeds an Organization block on every page, producing six logo URLs, three names, and separate IDs. It moves the organization node into a governed template, gives it one canonical @id, connects service and article pages to it, and adds breadcrumb and author markup from CMS fields. Validation becomes clean, but the report correctly describes answer visibility changes as observational rather than proof that schema caused them.

## Workstream 6

# Competitive and Citation Source Intelligence

## Outcome

Identify recommended competitors, the sources shaping category answers, evidence those sources reward, and credible paths to inclusion. The result is an ethical plan for content, partnerships, reviews, analyst relations, and PR based on influence and audience fit.

## Scope and out of scope

**In scope:** answer and citation capture; competitor inclusion and positioning; source-domain and URL analysis; source-type classification; claim and evidence gaps; outreach target scoring; citation change monitoring.

**Out of scope:** paying for undisclosed editorial placement; fake reviews or profiles; copying competitors; mass outreach; assuming a cited source is authoritative merely because a model used it; attempting to manipulate independent knowledge bases or journalists.

## Triggers and prerequisites

Start after priority prompt clusters are approved, before PR or partnership planning, at a category launch, and when competitor or citation patterns change. Confirm the competitive set, prohibited tactics, approved claims, spokespeople, customer references, and outreach ownership.

## Inputs and access

- Workstream 1 answer observations and workstream 2 priority prompt clusters
- Competitor websites, product documentation, reviews, directories, publications, communities, research, and public profiles
- Backlink and media databases where available, CRM and partnership history, press and analyst contacts
- Claim ledger, customer evidence, original data, expert access, and disclosure requirements

## Procedure

- 1. Prepare.** Define direct, alternative, and status-quo competitors by prompt cluster. Classify sources as first party, customer, marketplace, trade, media, research, standards, government, academic, community, partner, or knowledge base. Score recurrence, relevance, credibility, freshness, access, feasibility, market fit, and risk.
- 2. Diagnose.** Capture recommendations and citations across a controlled sample. Normalize URLs and record which sources support each claim or criterion. Compare competitor presence, positioning, proof, formats, and source portfolios. Identify citation hubs, conflicts, outdated pages, paywalls, syndication, and indirect citations. Verify quality manually.
- 3. Design.** Build a prompt-to-source heatmap and competitor evidence matrix. Prioritize gaps where the brand has evidence and the source reaches the buyer. Choose an owned-source improvement, original data, customer case, factual correction, editorial outreach, legitimate directory, partner guide, or no action. Brief the audience, editorial pattern, evidence, contact path, disclosure, and success signal.
- 4. Implement.** Make first-party claims clear, current, and citable. Package approved statistics, methods, experts, visuals, customer proof, and canonical links. Offer useful evidence through individualized outreach. Complete eligible profiles, correct errors transparently, support policy-compliant reviews, and log every contact and outcome.
- 5. QA.** Confirm each target's credibility, relevance, ownership, editorial policy, disclosure requirements, and current status. Fact-check outreach assets against the claim ledger. Test cited URLs for public access, canonicalization, and stability. Review conflicts of interest, embargoes, permissions, customer consent, and regulated statements. Remove low-quality sources even if they recur in answers.

- 6. Measure.** Track qualified source coverage, citation share and diversity, earned inclusions, corrections, referral engagement, brand mention quality, and downstream answer visibility by prompt cluster. Evaluate outcomes by source class and content asset, not raw link count. Revisit the source map monthly and the scoring model quarterly.
- 7. Handoff.** Deliver the source landscape, citation heatmap, competitor evidence matrix, priority target list, source briefs, outreach assets, contact log, and reporting view. Assign owners across PR, partnerships, customer marketing, product marketing, and content, with follow-up dates and approved messages.

## Operator checklist

- ☐ Competitors include alternatives and the status quo
- ☐ Citations are normalized, resolved, and tied to supported claims
- ☐ Source quality is manually reviewed
- ☐ Targets are scored for relevance, credibility, feasibility, and risk
- ☐ Outreach uses approved evidence and complies with disclosure rules
- ☐ Customer names, quotes, and data have permission
- ☐ Outcomes are measured by qualified coverage, not link volume
- ☐ Low-quality or manipulative opportunities are rejected

## Deliverables and Definition of Done

Deliver the citation dataset, taxonomy, heatmap, evidence matrix, target list, source briefs, outreach kit, contact log, and readout. Done means priority clusters have a mapped source landscape, ethical owned actions, approved evidence, and outcomes connected to monitored answers.

## KPIs

Qualified-source coverage; citation share and diversity; priority-source inclusion; factual correction rate; earned mention quality; referral engagement; citation persistence; competitor evidence-gap closure; outreach acceptance; answer inclusion following earned coverage, reported as association unless tested.

## Escalation triggers

Escalate for pay-to-play offers without clear disclosure, fake-review requests, source ownership conflicts, defamatory competitor claims, sensitive customer data, embargo or consent issues, coordinated manipulation proposals, or a recurring cited source with severe credibility or safety concerns.

## Dependencies and risks controls

This work depends on workstreams 1 and 2, the workstream 4 claim ledger, and PR and legal review. Control selection bias with a fixed prompt sample, authority-by-frequency with source-quality review, outreach risk with disclosure and approvals, and single-source dependence with portfolio diversity.

## Miniature example

A cybersecurity vendor is rarely recommended for midmarket evaluation prompts. The source heatmap shows that answer systems repeatedly cite two industry comparison guides and a standards-based explainer. Rather than pitch "rank us higher," the team publishes a transparent control-mapping study, supplies the methodology and an approved customer reference to relevant editors, and corrects an old directory profile. It measures qualified inclusion and citation persistence over the next two reporting cycles.

## Workstream 7

# Information Architecture and Internal Linking

## Outcome

Organize the site so people and retrieval systems can move from a broad need to an authoritative answer, evidence, related entity, and next action. The result is a clear topic graph, intentional page roles, shallow access, and maintainable link rules.

## Scope and out of scope

**In scope:** page-role definition; taxonomy; navigation; hub and detail relationships; breadcrumbs; internal links and anchor text; URL patterns; orphan and duplicate resolution; archive and redirect planning; link governance.

**Out of scope:** adding links only for volume; forcing exact-match anchors; creating a hub for every keyword; redesigning navigation without user and analytics evidence; changing URLs without redirects, measurement, and rollback; flattening the site until distinct buyer tasks become unclear.

## Triggers and prerequisites

Run after intent mapping, during redesigns or migrations, when orphaning or cannibalization is material, and before scaling content. Require a complete crawl and analytics inventory, priority journeys, CMS constraints, approved page owners, and engineering support for template or URL changes.

## Inputs and access

- Workstream 2 intent clusters and workstream 4 entity relationships
- Crawl, index, traffic, conversion, backlink, and internal-link data
- URL, content, template, navigation, taxonomy, and redirect inventories
- User research, site search, sales journeys, accessibility standards, and CMS capabilities

## Procedure

- 1. Prepare.** Assign each indexable page an audience, intent, entity, topic, stage, role, owner, and action. Define one primary purpose per page, clear labels, stable URLs, semantic links, accessible navigation, and no dead ends. Protect valuable URLs and record constraints.
- 2. Diagnose.** Calculate depth, inlinks, outlinks, orphans, broken links, redirects, anchors, canonical conflicts, near-duplicates, and template patterns. Compare paths with buyer journeys and citation pages. Inspect navigation, breadcrumbs, filters, pagination, mobile states, and HTML links. Find pages competing for one intent or mixing decisions.
- 3. Design.** Build a topic and entity graph. Define hubs for durable decisions and detail pages for distinct subproblems, products, evidence, locations, or resources. Specify relationships, breadcrumbs, labels, facet rules, URLs, and anchors. Assign each page a retain, update, create, consolidate, redirect, noindex, or remove decision with owner.
- 4. Implement.** Improve global and local navigation, contextual links, breadcrumbs, related resources, and next-step modules through reusable templates where possible. Link claims to primary evidence and products to relevant documentation, cases, comparisons, and policies. Use descriptive natural anchors that set accurate expectations. Consolidate overlapping pages, update canonicals, and deploy one-hop redirects for changed URLs. Update sitemaps, feeds, and tracking annotations.
- 5. QA.** Re-crawl staging and production. Test priority user journeys on desktop, mobile, keyboard, and screen reader where applicable. Confirm links exist in accessible HTML, anchors match destination content, breadcrumbs and canonicals agree, redirects preserve intent, and no new orphan or loop is created. Compare crawl counts and analytics events before and after launch.

- 6. Measure.** Monitor priority-page depth, internal-link coverage, orphan rate, crawl distribution, indexation, destination engagement, path completion, conversion assists, and citation landing-page performance. Review whether consolidated pages gain relevant impressions and answer inclusion without masking lost demand. Run a quarterly architecture hygiene review.
- 7. Handoff.** Deliver the current and target architecture maps, page-role inventory, decision log, internal-link specification, anchor guidance, redirect map, QA evidence, and governance rules. Train content editors to add links by relationship and user need. Assign template, navigation, and redirect owners.

## Operator checklist

- ☐ Every priority page has one primary role, intent, entity, and owner
- ☐ Priority pages are reachable through clear navigation or contextual paths
- ☐ Orphans, broken links, loops, and competing pages are resolved
- ☐ Anchors are descriptive, varied, and accurate
- ☐ Claims connect to evidence and related entities
- ☐ URL changes include one-hop redirects and updated canonicals
- ☐ Mobile and accessible-navigation states pass QA
- ☐ Architecture rules are embedded in CMS and editorial workflows

## Deliverables and Definition of Done

Deliver the architecture and entity graph, page-role inventory, consolidation matrix, target sitemap, navigation and linking specifications, redirect map, QA report, and governance guide. Done means all priority intents have an authoritative destination, key pages meet the agreed depth and inlink thresholds, material orphans and conflicts are resolved, redirects and canonical signals pass QA, and editors can maintain the system without manual guesswork.

## KPIs

Priority-page crawl depth; orphan rate; meaningful inlinks per priority page; broken-link and redirect-chain rate; canonical conflicts; journey completion; assisted conversions; destination engagement; index coverage; citation landing-page diversity; time to fix architecture defects.

## Escalation triggers

Escalate for URL changes without a migration window, revenue pages losing navigation exposure, large traffic or index loss, redirect mapping conflicts, accessibility failures, CMS limitations that hide links from rendered HTML, or stakeholder demands to retain duplicate pages with no distinct user need.

## Dependencies and risks controls

This work depends on workstreams 2, 3, and 4 and on CMS and UX owners. Control migration loss with baselines and redirects, link spam with editorial rules, over-consolidation with query and conversion evidence, and governance drift with template automation and quarterly crawls.

## Miniature example

A healthcare software site has separate, overlapping pages for "patient messaging," "secure messages," and "HIPAA texting," each buried four clicks deep. Research shows two distinct decisions: capability evaluation and compliance assurance. The team consolidates capability content into one hub, retains a sourced compliance page, connects them with precise anchors and breadcrumbs, redirects duplicates, and measures both journey completion and answer-citation landing pages.

## Workstream 8

# Content Portfolio and Answer Engineering

## Outcome

Build a portfolio of accurate, differentiated, citable content that resolves buyer questions, supplies evidence, and supports the next decision. The result is a governed answer system spanning education, evaluation, proof, implementation, and use.

## Scope and out of scope

**In scope:** content inventory and scoring; gap analysis; answer and evidence design; briefs; original research; comparison and alternatives content; product documentation; expert and customer proof; refresh, consolidation, retirement, and conversion paths.

**Out of scope:** mass-producing pages from prompt variations; copying AI answers or competitors; publishing unsupported claims, fake expertise, or anonymous reviews; optimizing for extraction at the expense of readers; generating content without an owner, evidence source, or maintenance plan.

## Triggers and prerequisites

Run after intent and architecture work, before quarterly editorial planning, during launches, and when monitoring shows coverage, accuracy, citation, or freshness gaps. Require priority clusters, page roles, approved claims, SME access, conversion goals, and an editorial owner with review capacity.

## Inputs and access

- Workstream 2 intent-to-asset map, workstream 6 source intelligence, and workstream 7 page roles
- Content inventory, analytics, conversions, citations, backlinks, search performance, and sales usage
- Product truth, research data, customer permissions, expert interviews, policies, and documentation
- CMS, editorial workflow, design support, analytics, and legal or regulatory reviewers

## Procedure

- 1. Prepare.** Define the portfolio's job across discover, understand, evaluate, trust, adopt, and expand. Score audience fit, intent coverage, accuracy, originality, evidence, clarity, freshness, visibility, conversion contribution, and maintenance cost. Assign every asset a type, owner, review date, and cluster.
- 2. Diagnose.** Inventory indexable and high-use non-indexable assets. Find thin, stale, overlapping, unsupported, orphaned, or high-performing pages. Compare priority questions with answers and citation patterns. Separate information, proof, format, distribution, and retrieval gaps so the default is not "write another article."
- 3. Design.** Choose retain, refresh, consolidate, create, repurpose, gate, noindex, or retire. Brief the audience, decision, question, answer, context, criteria, steps, tradeoffs, evidence, expert, sources, entities, related pages, visual or tool, objections, conversion, reviews, and freshness owner. Select the best format, from guide or comparison to documentation, research, calculator, video, or policy.
- 4. Implement.** Lead with a direct, qualified answer, then provide depth. Use descriptive headings, useful lists or tables, definitions, examples, methods, dates, named reviewers, and primary evidence. Show limitations and tradeoffs. Add relevant product paths without interrupting the answer. Consolidate duplicates, redirect valuable URLs, and distribute original evidence through approved channels.
- 5. QA.** Check claims, citations, calculations, quotes, rights, consent, accessibility, metadata, links, schema, mobile, and tracking. Require SME review for technical content and appropriate approval for regulated topics. Confirm readers can find the answer, evidence, date, author, limitation, and next step. Screen for duplication and unsupported generated text.

- 6. Measure.** Evaluate cluster coverage, inclusion, citations, qualified referrals, evidence engagement, assisted conversions, sales use, earned mentions, decay, and refreshes. Compare changed assets with a baseline. Diagnose losses before reversing changes; distinguish seasonal, technical, competitive, and model effects.
- 7. Handoff.** Deliver the scored inventory, portfolio decision log, editorial roadmap, completed briefs, reusable answer templates, source and claim records, publication checklist, and refresh calendar. Train writers and SMEs on evidence standards and page roles. Assign a single accountable owner and next-review date to every priority asset.

## Operator checklist

- ☐ Each asset serves a defined audience, decision, intent cluster, and page role
- ☐ The primary answer is clear, accurate, qualified, and easy to locate
- ☐ Claims link to current primary evidence or approved proof
- ☐ Authors, reviewers, methods, dates, limitations, and update owners are visible where relevant
- ☐ Comparisons use consistent, defensible criteria
- ☐ No duplicate asset competes for the same primary intent
- ☐ Accessibility, mobile, links, schema, and tracking pass QA
- ☐ Every priority asset has a conversion path and review date

## Deliverables and Definition of Done

Deliver the inventory, scorecard, gap map, decision log, roadmap, briefs, QA templates, changed assets, and maintenance calendar. Done means priority clusters have an authoritative asset or non-content action, answers pass evidence and QA standards, overlaps are resolved, measurement is active, and owners and review dates are recorded.

## KPIs

Priority-cluster coverage; evidence-complete asset rate; factual QA pass rate; citation and inclusion rate; qualified organic and AI referral engagement; assisted conversion and pipeline; earned links or mentions from qualified sources; consolidation success; content decay; on-time refresh rate; sales adoption.

## Escalation triggers

Escalate when evidence cannot support the desired claim, an SME disputes a published answer, content affects medical, legal, financial, safety, or regulatory decisions, customer permission is missing, a comparison may be defamatory or unfair, generated content includes unverifiable statements, or a high-value consolidation creates an unexpected sustained loss.

## Dependencies and risks controls

This work depends on workstreams 2, 4, 6, and 7 plus editorial and SME capacity. Control content sprawl with one-primary-asset rules, hallucination with claim-level sourcing, decay with review dates, bias with explicit criteria and limitations, and conversion overreach with reader-first answer structure.

## Miniature example

A logistics platform has 18 short route-optimization posts but no evaluation page. The team consolidates them into one evidence-led guide with a benchmark method, calculator, implementation tradeoffs, expert review, and two cases. Old URLs redirect to the guide. The scorecard tracks citations, calculator use, sales sharing, and influenced opportunities alongside traffic.

## Workstream 9

# Expertise Evidence and Information Gain

**Outcome.** Turn the client's expertise, operating data, and customer experience into source-worthy assets that give people and answer engines specific reasons to trust, cite, and choose the brand.

**Scope.** This SOP covers expert discovery, evidence capture, claim substantiation, original research, first-party data, case studies, bylined expertise, and an evidence library. "Information gain" means facts, methods, examples, datasets, tools, or perspectives that are not paraphrases of existing pages.

**Out of scope.** Routine keyword copy, unsupported opinion pieces, legal or academic peer review, paid endorsements, and external promotion belong elsewhere. Workstream 10 handles outreach and earned coverage; Workstream 11 handles reviews and community reputation.

**Triggers and prerequisites.** Start when priority pages are generic, AI answers cite competitors' research, expert claims lack proof, a launch needs authority, or a prompt cluster has no differentiated answer. Prerequisites are an approved prompt and topic map, canonical brand facts, named business and editorial owners, and a claim-review path for legal, privacy, clinical, financial, or regulated statements.

**Inputs and access.** Obtain subject-matter experts, customer research, call themes, product or transaction data, analytics, CRM reports, prior studies, approved testimonials, source documents, and CMS access. Record owners, periods, samples, permitted uses, and confidentiality restrictions.

## Procedure

- 1. Prepare.** Select one high-value buyer question. Write an evidence brief: audience, question, contribution, format, target page, owner, due date, and reviews. Create a claim ledger for source, method, period, geography, sample, limitations, reviewer, and approved wording.
- 2. Diagnose.** Review the top cited and ranking sources. Mark each contribution: definition, benchmark, method, example, data, tool, or interpretation. Interview sales, service, and product teams for useful, supportable observations. Classify candidates as new data, synthesis, method, proprietary example, or expert judgment. Reject restatements of consensus.
- 3. Design.** Choose the smallest credible evidence product: expert explainer, methodology note, benchmark, annotated example, calculator, decision framework, customer case study, or research report. Define the collection and analysis method before looking for a favorable conclusion. Set inclusion rules, minimum sample, comparison basis, anonymization, citation format, and update date. Plan a short answer, detailed method, key findings, limitations, and downloadable or reusable elements.
- 4. Implement.** Record structured interviews and preserve attributable quotes and sources. Analyze authorized data in a reproducible file. Draft claims with precise subjects, periods, denominators, and qualifiers. Connect authors to relevant credentials. Publish where the evidence answers the buyer question and link it from related pages. Add structured data only when it matches visible content.
- 5. QA.** A second reviewer checks calculations, sample labels, citations, quotations, permissions, dates, and alignment between headline and findings. A subject expert checks technical accuracy; an editor checks clarity; the designated approver checks sensitive claims. Test every chart, download, link, author page, and mobile view. Remove claims that cannot be traced to an approved source.
- 6. Measure.** Record the publication date and affected prompt/page set. Track cited-domain appearances, earned mentions, backlinks, qualified engagement, assisted conversions, and changes in answer-engine mention or citation patterns. Compare against a prepublication baseline, while noting that AI answers vary and correlation is not proof of causation.

**7. Handoff.** Store the final asset, raw evidence location, method note, claim ledger, approval record, reusable excerpts, and next-review date in the client knowledge base. Assign an owner for updates and list downstream uses for content, sales enablement, PR, and customer education.

## Operator checklist

- ☐ The asset answers a prioritized buyer question.
- ☐ Its information gain is named in one sentence.
- ☐ Every material claim has a source and approval status.
- ☐ Method, sample, date range, and limitations are visible.
- ☐ Customer and employee permissions are documented.
- ☐ Expert identity and relevant credentials are verifiable.
- ☐ Findings are connected to commercial and educational pages.
- ☐ Review date and maintenance owner are assigned.

**Deliverables.** Evidence brief; source-gap matrix; interview notes; approved claim ledger; research or case-study asset; methodology note; author/expert profile updates; reusable evidence snippets; maintenance record.

**Definition of Done.** The asset is live, indexable, fact-checked, approved, linked from relevant pages, and backed by a complete claim ledger. A reader can determine who produced it, how the evidence was obtained, what it supports, and what its limits are. Ownership and the next review date are recorded.

**KPIs.** Percentage of priority claims with primary evidence; number of publishable first-party insights; qualified references and backlinks; citation-domain diversity; engagement with evidence assets; influenced opportunities; content refresh compliance; correction rate. Pair output counts with quality measures-ten weak "studies" are not progress.

**Escalation triggers.** Escalate when data consent is unclear, sample size may mislead, a claim conflicts with source data, a customer approval is missing, a regulated assertion lacks qualified review, or leadership requests removal of material limitations.

**Dependencies.** Prompt intelligence; entity and fact management; content architecture; schema; analytics; Workstream 10 distribution; Workstream 16 governance.

**Risks and controls.** Cherry-picking is controlled with a prewritten method; stale proof with review dates; fabricated expertise with named reviewers and source records; privacy exposure with minimization and anonymization; overclaiming with qualified language; weak differentiation with the source-gap test.

**Miniature example.** For "best onboarding platform for distributed teams," the engineer analyzes 412 anonymized projects, defines "time to first completed workflow," publishes medians by team size, explains exclusions, and adds two implementation patterns. The claim ledger links each number to approved analysis. Related product and comparison pages cite the study; PR pitches it, and reporting watches for relevant citations.

## Workstream 10

# Citation Earning Digital PR and Authority

**Outcome.** Earn accurate brand references from sources buyers and answer systems trust, creating independent corroboration rather than manufactured popularity.

**Scope.** This SOP covers citation-source research, authority gaps, evidence-led campaigns, media outreach, expert responses, partner and association placements, link reclamation, unlinked mentions, and coverage monitoring. Relevance, editorial independence, and accuracy govern the work.

**Out of scope.** Buying links, private link networks, mass guest-post exchanges, undisclosed advertorials, fake awards, automated spam pitches, review acquisition, and guaranteed placement schemes are prohibited. Production of the underlying research belongs to Workstream 9; listings and customer reviews belong to Workstream 11.

**Triggers and prerequisites.** Begin when competitors dominate citations, the client has strong evidence but little independent coverage, high-value prompts rely on a concentrated set of publishers, important mentions are wrong or unlinked, or a launch creates a timely story. Prerequisites include an approved evidence asset or expert proposition, canonical brand facts, spokesperson availability, disclosure rules, and authority to conduct outreach from an approved domain.

**Inputs and access.** Use prompts, citation exports, competitor links, media databases, relationships, expert biographies, case studies, research, brand guidance, approved claims, embargo policy, analytics, outreach accounts, and monitoring tools.

## Procedure

- 1. Prepare.** Define the campaign's topic, audience, proof, news value, target action, timing, and success window. Create a contact and placement log that records source, beat, relationship, pitch angle, status, follow-up date, disclosure requirement, final URL, and accuracy check. Set stop rules for frequency and opt-outs.
- 2. Diagnose.** Identify domains and pages that recur in citations and search. Segment news, trade press, research, associations, directories, communities, podcasts, newsletters, and partners. Compare coverage by topic, not only domain authority. Flag misinformation, broken links, unlinked mentions, and sources whose risk outweighs reach.
- 3. Design.** Match each source segment to a legitimate reason to cover the brand: new first-party data, expert analysis of a live issue, a verified customer result, a public tool, a contributed technical explanation, or a relevant partnership. Prepare a source-specific pitch, a concise fact sheet, approved expert bio, visual or data support, canonical link, disclosure language, and response SLA. Avoid one generic story sent to every outlet.
- 4. Implement.** Prioritize warm and high-fit contacts, then send individualized pitches that lead with the audience value. Respond quickly to source questions and provide traceable evidence. Run expert-response and newsroom calendars for recurring opportunities. Reclaim broken links and request corrections politely with proof. When coverage lands, verify spelling, positioning, facts, links, and disclosures before amplifying it through owned channels.
- 5. QA.** Review every pitch for claim approval, relevance, tone, privacy, exclusivity, embargo, and conflicts of interest. Confirm that published pages are accessible and that links resolve to canonical destinations. Record whether coverage is editorial, sponsored, partner-authored, or self-published; do not represent paid placement as earned authority.
- 6. Measure.** Track relevant placements, authoritative domains, reclaimed links, cited-source share, citation diversity, referral quality, branded demand, assisted conversions, and durability at 30, 90, and 180 days. Compare untouched topics where practical. Treat citation changes as directional because answers vary.

**7. Handoff.** Provide the coverage register, live URLs, relationship notes, approved follow-up actions, performance snapshot, and open corrections. Add durable sources to the brand evidence graph and schedule rechecks for high-value pages. Hand sales and content teams concise, compliant ways to reuse the validation.

## Operator checklist

- ☐ Each target source is relevant to a priority topic and audience.
- ☐ The pitch offers evidence or utility beyond brand promotion.
- ☐ Claims, biographies, and disclosures are approved.
- ☐ Contact preferences, opt-outs, and embargoes are recorded.
- ☐ Paid, contributed, partner, and earned placements are labeled correctly.
- ☐ Published facts and links have been checked.
- ☐ Coverage is mapped back to prompts and buyer stages.
- ☐ Follow-up and durability checks are scheduled.

**Deliverables.** Citation-source landscape; authority-gap analysis; campaign brief; prioritized media and partner list; pitch and fact-sheet set; expert-response calendar; coverage and correction register; campaign performance report.

**Definition of Done.** The campaign is not done when pitches are sent. It is done when placements and non-results are documented, published coverage is verified, material errors are resolved or escalated, relationships are captured for future work, and results are evaluated against the baseline and campaign hypothesis.

**KPIs.** Relevant earned placements; new authoritative domains in the target topic; percentage of coverage containing accurate brand facts; cited-source share and diversity; referral engagement; influenced pipeline; link-reclamation rate; publisher response rate; placement durability; correction resolution time.

**Escalation triggers.** Escalate threatened legal action, embargo breaches, requests for undisclosed payment, material factual errors, hostile or deceptive sources, customer-identification requests, data-method challenges, executive quotes outside approval, or a reputational issue likely to spread.

**Dependencies.** Workstream 9 evidence; entity source of truth; content and landing pages; analytics and CRM; legal/compliance; Workstream 16 incident and approval paths.

**Risks and controls.** Spam risk is controlled with fit scoring and contact caps; authority theater with topical-relevance review; misquotation with written facts and recordings where permitted; paid-link risk with disclosure and rel-attribute review; fragile results with source diversification; measurement inflation with a relevant-placement definition agreed before launch.

**Miniature example.** AI answers about industrial heat-pump payback cite two engineering publications, not the manufacturer. The engineer maps their evidence preferences, publishes an anonymized 28-site dataset, and pitches a regional finding with the method. The resulting article links to the study. The team verifies facts, logs the relationship, measures qualified referrals, and monitors the target prompts next quarter.

## Workstream 11

# Reputation Reviews Listings and Community Presence

**Outcome.** Make the brand accurate, credible, and responsive wherever buyers validate a choice through verified facts, authentic customer experience, and useful community participation.

**Scope.** This SOP covers listings, review operations, sentiment and issue analysis, directory hygiene, community participation, impersonation detection, and corrections on channels material to the buyer journey.

**Out of scope.** Review gating, fabricated testimonials, employee astroturfing, undisclosed incentives, mass directory submissions, community spam, or suppression of legitimate criticism. Local profile features and commerce feeds that require specialized operating data are coordinated with Workstream 12.

**Triggers and prerequisites.** Start when AI or search results surface inconsistent facts, ratings are sparse or unrepresentative, a location or product changes, negative themes repeat, key profiles are unclaimed, a community influences the category, or competitors have materially stronger validation. Prerequisites include the canonical fact sheet, authorized profile owners, customer-contact permissions, response policy, and an escalation route for safety, legal, privacy, discrimination, or fraud concerns.

**Inputs and access.** Obtain profile access, canonical contact and category data, platform policies, customer-journey triggers, support cases, social listening, response templates, community rules, spokesperson identities, and reporting. Use role-based accounts and documented recovery owners.

## Procedure

- 1. Prepare.** Build a channel registry containing URL, audience, purpose, owner, login custodian, canonical facts, review policy, response SLA, status, and last audit. Tier channels as critical, relevant, monitor-only, or retire. Define which customer moments qualify for a neutral review invitation and which cases must first receive service recovery.
- 2. Diagnose.** Compare critical profiles with the source of truth: name, category, URL, contact, hours, service area, imagery, leadership, product status, and duplicates. Analyze reviews by theme, severity, recency, location, and response. Identify communities that shape buyer questions and distinguish discussion from promotion.
- 3. Design.** Create a compliant request flow for a representative customer set without conditioning on satisfaction. Draft response patterns for praise, criticism, misinformation, safety, and fraud; require human review. Community rules: disclose affiliation, answer the question, cite evidence, avoid link drops, and participate only when useful.
- 4. Implement.** Secure priority profiles, report duplicates, and correct facts from the canonical record. Activate review requests at approved moments and honor opt-outs. Respond within SLA using specific, non-defensive language; move personal details to a private channel. Named experts contribute in selected communities and log useful questions.
- 5. QA.** Verify changes publicly in logged-out and mobile views. Sample review invitations to confirm neutral wording and representative targeting. Review responses for privacy leaks, admissions, promises, and copy-and-paste repetition. Confirm community posts comply with local rules and disclose the relationship. Preserve screenshots and case IDs for unresolved platform changes.
- 6. Measure.** Track profile accuracy, duplicate resolution, review velocity and coverage, response rate and time, theme movement, rating distribution, qualified profile actions, community answer acceptance, branded search demand, and conversions where the platform permits. Never use average rating alone; watch volume, recency, representativeness, and issue severity.

**7. Handoff.** Deliver the channel registry, resolved-change log, open disputes, review-response queue, theme report, community calendar, and updated playbook. Route recurring product or service issues to the responsible operator rather than treating reputation work as a messaging fix.

## Operator checklist

- ☐ Critical profiles are claimed and protected with recovery ownership.
- ☐ Public facts match the approved source of truth.
- ☐ Duplicate and impersonation cases are logged.
- ☐ Review invitations are neutral, representative, and policy-compliant.
- ☐ Responses contain no private customer information.
- ☐ Severe issues follow the escalation matrix.
- ☐ Community affiliation is disclosed.
- ☐ Recurring themes reach product, service, and content owners.

**Deliverables.** Channel registry; listing consistency audit; profile correction log; review request flow; response library and escalation matrix; sentiment/theme report; community opportunity map; recurring reputation dashboard.

**Definition of Done.** All critical profiles are accurate or have documented open cases, eligible review journeys are operating, reviews have assigned response SLAs, serious issues route correctly, and the next audit is scheduled. Community participation has a named owner and a documented value standard.

**KPIs.** Critical-profile accuracy; unresolved duplicate count; representative review coverage; median response time; severe-issue closure time; recurring negative-theme rate; profile actions and qualified leads; useful community contributions; branded-fact correction rate; policy violations (target zero).

**Escalation triggers.** Immediately escalate threats, self-harm content, safety allegations, discrimination, fraud, extortion, doxxing, legal notices, regulator contact, coordinated review attacks, impersonation, or a complaint involving protected personal data. Escalate operationally when platform changes fail twice or a negative theme exceeds the agreed threshold.

**Dependencies.** Entity/fact management; customer operations; privacy and legal; local/vertical data; analytics; content insight process; Workstream 16 governance.

**Risks and controls.** Review manipulation is prevented with neutral targeting and audit samples; privacy exposure with response redaction; account loss with role-based access and recovery owners; inconsistent facts with a single source of truth; community backlash with disclosure and local-rule review; cosmetic reputation management with mandatory root-cause routing.

**Miniature example.** A three-location clinic has duplicate profiles, old hours, and reviews about phone waits. The engineer corrects facts, submits duplicate cases, and sends a neutral post-visit request to eligible patients. Sensitive reviews receive privacy-safe acknowledgments; operations receives a wait-time theme report. A disclosed clinician answers a community question that becomes a reviewed website guide. Success uses fact accuracy, response SLA, and theme recurrence-not rating alone.

## Workstream 12

# Local International Commerce and Vertical Data

**Outcome.** Supply current business data in the formats local, international, commerce, and vertical discovery require, so buyers see the right offer, location, language, availability, and constraints.

**Scope.** This SOP covers location and service-area data, local profiles, localization architecture, language and regional targeting, hreflang and canonical coordination, product and merchant feeds, availability and pricing synchronization, vertical directories, and regulated attributes. It also covers reconciliation between the website, structured data, feeds, and third-party destinations.

**Out of scope.** Full store operations, tax or customs implementation, marketplace advertising, translation without qualified review, inventory-system replacement, or legal determination of market eligibility. Those require the relevant business specialists; this workstream translates approved operating data into discoverable surfaces.

**Triggers and prerequisites.** Begin before a location, country, language, product line, or marketplace launch; when prices, hours, stock, or service areas conflict; when local or shopping visibility declines; or when AI answers recommend an ineligible offer. Prerequisites are stable internal IDs, canonical business facts, an authoritative product/location data source, market owners, and approvals for claims, pricing, taxes, shipping, and regulated categories.

**Inputs and access.** Obtain the location master, product catalog, inventory, pricing, CMS, profile manager, merchant accounts, translation memory, analytics, feed diagnostics, policies, and vertical credentials. Record each field's system of record and refresh frequency.

## Procedure

- 1. Prepare.** Define the operating unit-location, service area, language-region pair, SKU, practitioner, property, course, or other vertical entity. Create a field dictionary with ID, definition, source, format, market applicability, update owner, refresh SLA, and permitted public use. Map destination requirements and policy restrictions before building feeds or pages.
- 2. Diagnose.** Reconcile a sample across source systems, website, schema, feeds, profiles, and key directories. Check identifiers, contacts, coordinates, categories, hours, language, price, currency, stock, shipping, eligibility, credentials, and timestamps. International audits cover URL strategy, canonicals, hreflang reciprocity, language quality, and redirects. Find the earliest faulty handoff.
- 3. Design.** Select a durable architecture: one canonical ID per entity; market-specific URLs only when the experience differs; reusable location or product templates with meaningful unique content; feed transformations documented by field; fallback rules for missing values; and suppression rules for unavailable or ineligible offers. Define update frequencies based on volatility-inventory may need minutes, holiday hours days, credentials annually.
- 4. Implement.** Correct the system of record, then regenerate pages, schema, sitemaps, feeds, and profiles. Publish useful local proof such as service boundaries, accessibility, booking method, experts, and examples. Localize meaning, units, currency, support, and legal terms. Resync feeds, resolve errors, and log manual exceptions.
- 5. QA.** Validate structured data and feed syntax, sample live destination records, and test canonical/hreflang clusters. Confirm that visible page data matches machine-readable data, checkout or booking reflects advertised conditions, unavailable items are handled correctly, and location pages are genuinely distinct. Run market-owner and native-language review for priority pages. Test mobile maps, calls, directions, forms, and product actions.
- 6. Measure.** Monitor approved-item rate, feed error rate, data freshness, local profile actions, location and product page discovery, non-brand visibility by market, eligible impressions, conversions, cancellations caused by inaccurate data, and answer-engine accuracy for market-specific prompts. Segment by market, location, device, and entity type before drawing conclusions.

**7. Handoff.** Provide the field dictionary, destination map, exception queue, validation results, ownership matrix, refresh schedule, and launch/rollback notes. Train market operators on which fields they own and which must remain centrally controlled.

## Operator checklist

- ☐ Every entity has a stable canonical ID and URL policy.
- ☐ Each public field has a documented system of record.
- ☐ Website, schema, feed, and profile values agree.
- ☐ Market eligibility, currency, availability, and dates are explicit.
- ☐ Hreflang and canonicals pass reciprocal checks where used.
- ☐ Localized content has qualified human review.
- ☐ Destination errors and manual exceptions have owners.
- ☐ Volatile fields meet their freshness SLA.

**Deliverables.** Entity field dictionary; local/international/vertical data audit; destination and feed map; page/template specification; reconciliation report; launch checklist; exception queue; freshness dashboard; operator runbook.

**Definition of Done.** Priority entities render accurate, policy-compliant data on the site and selected destinations; feeds are accepted within the agreed threshold; market and mobile journeys work; mismatches are resolved or owned; monitoring and refresh schedules are active.

**KPIs.** Critical-field accuracy; feed approval and error rates; freshness SLA compliance; valid locale clusters; eligible impressions; local actions; product or booking conversion; inaccurate-data cancellations; market-specific answer accuracy; exception backlog age.

**Escalation triggers.** Escalate systemic price or inventory mismatches, prohibited-product errors, wrong-market legal terms, sensitive location exposure, credential expiration, tax/shipping ambiguity, mass feed rejection, or a canonical/hreflang change that could affect a large URL set.

**Dependencies.** Entity and schema systems; technical discoverability; CMS/PIM/inventory; market operations; legal and localization; analytics; governance and deployment QA.

**Risks and controls.** Stale data is controlled with source-level timestamps and SLAs; doorway pages with usefulness criteria and uniqueness checks; mistranslation with native review; duplicate international pages with canonical/hreflang design; costly feed mistakes with staged samples and rollback; regional noncompliance with market approval gates.

**Miniature example.** A retailer's Canadian AI recommendations show U.S. prices and unavailable products. The engineer assigns stable SKU IDs, maps Canadian price and inventory, fixes locale canonicals and hreflang, and suppresses out-of-stock products. Ten SKUs pass end-to-end testing before full sync. Reporting tracks field agreement, feed acceptance, eligible impressions, and stock-mismatch cancellations; cross-market price leakage triggers rollback.

## Workstream 13

# Multimodal and Agentic Experience Readiness

**Outcome.** Make the brand's knowledge usable across text, image, video, audio, and task-oriented AI experiences. People and authorized agents can understand an offer, verify its source, complete supported actions, and reach a human when automation is uncertain.

**Scope.** This SOP covers transcripts, captions, alt text, media metadata, content equivalents, conversational interfaces, agent-accessible actions, API or form readiness, attribution, consent, safety boundaries, fallback, and human handoff across discovery and action.

**Out of scope.** A general-purpose chatbot, autonomous high-risk decisions, unrestricted browsing or purchasing, replacement of accessibility testing, or exposing internal systems for crawler convenience. Product engineering and security retain ownership of production agents and transactional APIs.

**Triggers and prerequisites.** Start when high-value knowledge exists mainly in media, buyers use visual or voice discovery, AI referrals reach pages that are hard to act on, a brand launches a conversational assistant, or repeated support questions could become bounded self-service. Prerequisites include approved journeys, canonical facts, accessible source content, data classification, authentication rules, human support ownership, and security/privacy review.

**Inputs and access.** Obtain media, CMS, design system, knowledge base, forms, APIs, identity and consent systems, support workflows, accessibility results, analytics, and agent logs. Document allowed actions, sensitive fields, systems of record, limits, error states, and contacts.

## Procedure

- 1. Prepare.** Choose one discovery or task journey, such as "understand the installation process" or "book a consultation." Write the user goal, authorized actor, required facts, supported inputs, success event, excluded actions, risk level, human fallback, and measurement plan. Inventory every text and media asset the journey depends on.
- 2. Diagnose.** Test text, mobile, keyboard, screen-reader, voice, and low-bandwidth contexts as relevant. Check video transcripts and captions, useful image context, textual chart summaries with dates, and searchable audio notes. For agentic journeys, inspect ambiguity, stale knowledge, broken forms, hidden requirements, authentication gaps, unsafe permissions, and dead ends.
- 3. Design.** Create a modality plan: authoritative text remains the source; each media item has a caption, transcript or descriptive equivalent, provenance, date, and canonical URL. For actions, define a narrow capability contract with required fields, validation, confirmation, consent, idempotency, timeout, rollback or cancellation, audit logging, and human handoff. Require source links and uncertainty language for generated answers.
- 4. Implement.** Publish corrected transcripts, captions, alt text, summaries, chapters, thumbnails, and metadata matching visible content. Ensure key facts and actions avoid fragile interactions. Connect conversations only to approved knowledge and least-privilege tools. Confirm consequential actions, protect personal data, and provide human help.
- 5. QA.** Verify media accuracy, synchronization, contrast, keyboard operation, link targets, source attribution, and mobile layout. Run a test suite containing happy paths, incomplete inputs, conflicting instructions, prompt injection, duplicate submission, expired session, unavailable service, wrong geography, and escalation. Confirm that logs exclude prohibited data and that the experience fails safely.
- 6. Measure.** Track media discoverability, transcript engagement, accessibility defects, source-click rate, task start and completion, abandonment step, clarification rate, handoff rate, unsafe-action blocks, duplicate actions, error recovery, satisfaction, and qualified conversion. Segment automated completions from human-assisted completions and review failure transcripts, not only averages.

- 7. Handoff.** Deliver the modality inventory, capability contract, test suite and results, approved knowledge set, safety boundaries, monitoring dashboard, incident route, and update cadence. Assign owners for media, knowledge, tools, and human support; train operators on disabling a capability without taking down the full experience.

## Operator checklist

- ☐ Each key media asset has an accurate, accessible text equivalent.
- ☐ Facts show source, date, and canonical destination.
- ☐ Supported actions and prohibited actions are explicit.
- ☐ Tools use least privilege and validated inputs.
- ☐ Consequential actions require confirmation and an audit trail.
- ☐ Human handoff works and includes relevant context with consent.
- ☐ Adversarial, failure, accessibility, and duplicate-action tests pass.
- ☐ Kill switch, owner, and review date are documented.

**Deliverables.** Modality and accessibility inventory; content-equivalence backlog; agent journey map; capability contract; approved knowledge manifest; guardrail and handoff specification; test suite; QA report; monitoring and incident runbook.

**Definition of Done.** Priority media is understandable without relying on a single modality, the selected task works for authorized users, sources are visible, critical failures stop safely, handoff is tested, telemetry is active, and named owners can update or disable the experience.

**KPIs.** Priority-media coverage; accessibility defect rate; source attribution rate; task completion; clarification and handoff rates; qualified conversion; error recovery; unsafe or unauthorized actions (target zero); duplicate transactions (target zero); knowledge freshness.

**Escalation triggers.** Escalate unauthorized access, personal-data leakage, unsafe advice, irreversible action without confirmation, prompt-injection success, repeated hallucinated policy, accessibility blockers, material source mismatch, or inability to disable a faulty capability.

**Dependencies.** Content and evidence systems; entity and product data; security, privacy, accessibility, product engineering, analytics, conversion design, deployment QA, and governance.

**Risks and controls.** Hallucination is limited with bounded knowledge and sources; over-permission with least privilege; accidental transactions with confirmation and idempotency; exclusion with accessible equivalents; stale answers with freshness checks; opaque failures with structured logs and human handoff.

**Miniature example.** Installation guidance exists only in a 22-minute video. The engineer publishes a reviewed transcript, chapters, a described visual checklist, and a source date. A bounded assistant answers from that material and can request a technician, but cannot diagnose safety-critical faults. Tests cover unknown models, duplicate requests, injection, and emergency language. Users reach the checklist or submit one valid request; safety questions hand off.

## Workstream 14

# Experimentation Deployment QA and Change Management

**Outcome.** Move AI-visibility changes from idea to production through controlled, observable releases. The team learns what likely helped, limits defects, and can explain or reverse every material change.

**Scope.** This SOP covers hypothesis design, prioritization, test units, baselines, release tickets, staging, content and technical QA, sampling of variable AI answers, rollout, monitoring, rollback, change communication, and experiment records.

**Out of scope.** Unreviewed production edits, tests that deceive users or crawlers, statistical claims unsupported by the design, or platform experiments that violate terms. Business owners approve high-impact changes; this workstream supplies the operating discipline.

**Triggers and prerequisites.** Use for any change intended to affect retrieval, understanding, citation, recommendation, or conversion, and for migrations or template edits with broad reach. Prerequisites are a measurable target, stable owner, baseline window, deployment access, analytics, representative QA environment, rollback path, and change calendar.

**Inputs and access.** Use the prioritized backlog, prompt set, page and template inventory, crawler/index data, schema tests, content approvals, repository or CMS, staging environment, analytics, monitoring, release log, and incident contacts. Record external events such as algorithm shifts, PR campaigns, seasonality, and major competitor changes.

## Procedure

- 1. Prepare.** Write a falsifiable hypothesis in the form: because of observed evidence, changing X for population Y should move metric Z within window T, while guardrails remain within limits. Define the experimental unit, control or comparison, baseline, minimum observation count, decision rule, owner, risk class, and rollback condition. Avoid bundling unrelated changes.
- 2. Diagnose.** Confirm the problem exists and the measurement works. Re-run prompts across agreed engines, accounts, locations, and repetitions; verify the page state, indexing, tracking, and conversion event. Separate a content gap from a crawl, entity, reputation, or instrumentation problem. Note confounders and whether a controlled test, phased rollout, or interrupted time-series comparison is feasible.
- 3. Design.** Choose the safest informative method: page-pair test, market or location holdout, staggered rollout, template sample, or pre/post with comparison set. Specify change details, sample, duration, prompt run schedule, QA cases, approval path, guardrails, and interpretation limits. Predefine outcomes as ship, iterate, revert, or inconclusive.
- 4. Implement.** Build in a versioned environment, attach approved copy and data sources, and record changed URLs, templates, schemas, feeds, links, and tracking. Deploy first to the smallest representative cohort when risk warrants it. Capture before-state evidence and release identifiers. Communicate timing to analytics, content, support, and commercial owners.
- 5. QA.** Test rendering, accessibility, links, forms, analytics, canonicals, robots directives, schema, sitemaps, locale behavior, and performance as applicable. Compare visible and structured facts. Conduct editorial and legal review for claims. After launch, validate the public result, logs, index eligibility, and guardrail metrics. Revert immediately if a predefined stop condition occurs.
- 6. Measure.** Repeat prompt measurements enough to reduce single-answer noise and report distributions, not a cherry-picked screenshot. Compare change and control groups against baseline. Track visibility, citations, qualified traffic,

conversion, errors, and guardrails. Label results causal only when the design supports that conclusion; otherwise use "associated with" and document competing explanations.

- 7. Handoff.** Close the release with outcome, evidence, decision, limitations, incidents, final state, reusable learning, and follow-up date. Update the backlog, pattern library, and monitoring. Ensure operators know what changed and how to roll it back.

## Operator checklist

- ☐ Hypothesis, primary metric, guardrails, and decision rule are written first.
- ☐ Baseline and comparison set are valid.
- ☐ Change scope and release identifier are recorded.
- ☐ Required editorial, legal, technical, and analytics approvals are complete.
- ☐ Staging and public smoke tests pass.
- ☐ Rollback is tested or operationally credible.
- ☐ Prompt sampling uses a documented repeatable protocol.
- ☐ Result is classified ship, iterate, revert, or inconclusive.

**Deliverables.** Experiment brief; release and change ticket; before/after evidence; QA matrix; approval record; monitoring snapshot; experiment readout; rollback note; updated learning library.

**Definition of Done.** The final production state is verified, guardrails are healthy, the result and its uncertainty are documented, stakeholders know the decision, and monitoring plus rollback ownership remain active. An inconclusive result can be done if the learning and next decision are explicit.

**KPIs.** Experiment throughput; median lead time; percentage with valid baselines; QA escape rate; rollback rate; time to detect and recover; measurement completeness; percentage producing a decision; win and inconclusive rates by intervention type; durable movement after the observation window.

**Escalation triggers.** Escalate deindexing, traffic or conversion loss beyond guardrail, inaccurate claims, broken critical journeys, broad template defects, privacy events, unexplained analytics discontinuity, stakeholder conflict over the decision rule, or an external event that invalidates the test.

**Dependencies.** All implementation workstreams; analytics; engineering/CMS; legal and accessibility; incident management; Workstream 16 prioritization and approvals.

**Risks and controls.** False wins are controlled with predeclared metrics and repeated samples; release collisions with a change calendar; broad defects with staged rollout; irreversible edits with versioning and rollback; slow learning with smaller tests; suppressed negative results with a complete experiment registry.

**Miniature example.** A software company believes explicit implementation requirements will improve recommendations for regulated buyers. The engineer updates five solution pages while five matched pages remain unchanged, verifies indexing and analytics, and runs the same prompt protocol for six weeks. Visibility improves on the changed set, but demo conversion falls below its guardrail because requirements dominate the page. The team revises the layout and retests rather than declaring a visibility win.

# Experiment with a decision before the change

Pre-register the cohort, primary metric, guardrails and rollback condition.

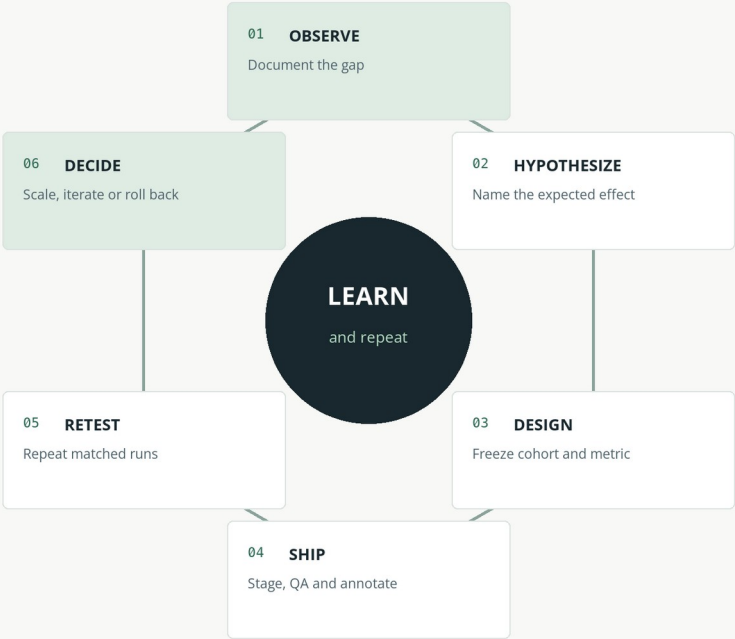


Figure 3 The deployment experiment loop

# Conversion Analytics Attribution and Revenue

**Outcome.** Connect AI discovery to qualified actions, opportunities, and revenue with an honest measurement model. The program shows business contribution without pretending every AI-influenced journey can be deterministically traced.

**Scope.** This SOP covers event design, AI-referral classification, campaign tagging, landing-path analysis, self-reported attribution, CRM source capture, identity-safe stitching, funnel reporting, assisted influence, cohort analysis, experimentation support, and revenue feedback to the workstream backlog.

**Out of scope.** Fingerprinting, prohibited cross-device tracking, retroactive invention of source data, single-touch revenue claims, or vendor "AI traffic" labels accepted without validation. Finance owns recognized revenue; sales operations owns CRM process; privacy owners define permitted data use.

**Triggers and prerequisites.** Start before baseline reporting, a campaign launch, conversion redesign, CRM migration, or executive ROI review; also start when direct traffic grows, AI referrals are misclassified, or visibility rises without commercial evidence. Prerequisites are agreed business outcomes, a consent model, analytics and CRM owners, stable IDs where permitted, and definitions for lead, qualified lead, opportunity, customer, and revenue.

**Inputs and access.** Obtain analytics, tag and consent managers, approved logs, forms, scheduling or commerce systems, call tracking, CRM, automation, revenue data, prompt exports, and campaign records. Maintain known AI referrers while preserving raw source fields.

## Procedure

- 1. Prepare.** Build a measurement plan from business outcome backward. For each funnel stage, define event name, trigger, properties, source system, owner, quality rule, retention, and reporting use. Establish attribution views—first known touch, last non-direct touch, multi-touch influence, self-reported source, and experiment incrementality—without forcing them into one number.
- 2. Diagnose.** Audit events, duplicate tags, consent, cross-domain breaks, bots, internal traffic, missing referrers, CRM fields, offline handoffs, and revenue reconciliation. Trace sample journeys to closed outcome. Compare known AI referrals with direct, organic, email, and copied-link behavior; document unknowns.
- 3. Design.** Create a channel taxonomy and maintainable classification rules for known AI sources, source URLs, campaign parameters, and unknown traffic. Add a short self-reported question at a sensible point, preserving the respondent's words plus a normalized category. Define dashboards by prompt/topic, landing page, offer, audience, market, and cohort. Set data-quality thresholds and finance reconciliation cadence.
- 4. Implement.** Deploy events and parameters through the approved consent path, map fields into CRM records, and preserve source history rather than overwriting it. Add tags to controllable links used in PR, partner, media, and agent experiences. Connect opportunities and revenue at the permitted level. Annotate launches, campaigns, and tracking changes so trends can be interpreted.
- 5. QA.** Test consent granted, denied, and withdrawn states; desktop and mobile; form success and failure; duplicate submission; cross-domain journeys; offline import; and CRM stage changes. Confirm timestamps, currencies, time zones, channel rules, and revenue totals. Inspect raw examples before trusting aggregates, and suppress small or sensitive cohorts where required.
- 6. Measure.** Report a visibility-to-value chain: eligible presence, mention/citation, visit or reported discovery, engaged session, qualified action, opportunity, and revenue. Show volume, rates, lag, and cohort quality. Use experiments or holdouts for incrementality when feasible; otherwise label contribution as observed or influenced. Pair revenue with cost and delivery effort for efficiency.

**7. Handoff.** Deliver the measurement dictionary, channel rules, data-flow map, QA evidence, dashboard, known limitations, reconciliation record, and anomaly runbook. Train marketing, sales, and leadership on the approved interpretation of each attribution view and the decisions it supports.

## Operator checklist

- ☐ Business-stage definitions are agreed across marketing, sales, and finance.
- ☐ Consent and data minimization are built into collection.
- ☐ Raw referrer and landing data are retained where permitted.
- ☐ AI channel rules are documented and versioned.
- ☐ Self-reported and observed attribution remain distinct.
- ☐ Sample journeys reconcile from event to CRM outcome.
- ☐ Dashboards expose unknowns and data-quality status.
- ☐ Revenue reports reconcile to the approved finance source.

**Deliverables.** Measurement plan and event dictionary; AI-source taxonomy; data-flow and identity map; tracking implementation; QA report; funnel and revenue dashboard; attribution limitations note; monthly performance narrative; anomaly runbook.

**Definition of Done.** Priority journeys produce reliable events, qualified outcomes reach the CRM, revenue reconciles within tolerance, consent works, AI sources are classified where observable, uncertainty is explicit, and owners can diagnose a break without rebuilding the system.

**KPIs.** Event and CRM completeness; consent compliance; classification coverage; qualified conversion by source/topic; opportunity and revenue influence; sales acceptance; customer acquisition cost where valid; pipeline velocity; data freshness; reconciliation variance; anomaly resolution time.

**Escalation triggers.** Escalate consent failure, personal-data leakage, unexplained revenue variance, large source-classification shift, duplicate conversion inflation, missing CRM stages, executive pressure to present influence as causation, or tracking changes that invalidate a comparison period.

**Dependencies.** Prompt and visibility measurement; all traffic-producing workstreams; web/product analytics; CRM and finance; privacy/legal; experimentation; governance.

**Risks and controls.** Over-attribution is controlled with multiple labeled views; dark traffic with self-reporting and explicit unknowns; broken tracking with automated checks and journey sampling; privacy risk with minimization and consent; dashboard theater with decision-linked metrics; source drift with versioned rules.

**Miniature example.** An advisory firm sees more branded search but few AI referrers. The engineer preserves known referrals, adds a neutral self-report field, maps both signals into CRM, and reports them separately. In one quarter, 18 qualified leads mention AI and four known referrals convert; six opportunities overlap. Leadership receives an influence range and cohort quality, not a causal claim.

# Program Governance Risk and Continuous Improvement

**Outcome.** Run AI Visibility Engineering as an accountable program with owned priorities, proportionate controls, early risk detection, and continuous roadmap improvement.

**Scope.** This SOP covers charter, roles, intake, prioritization, approvals, records, data and vendor risk, content and model-use policy, incidents, operating cadence, maturity, retrospectives, and roadmap renewal.

**Out of scope.** Replacing corporate legal, security, privacy, accessibility, records, procurement, or crisis-management functions. The program integrates those authorities and makes their requirements operational for AI visibility work.

**Triggers and prerequisites.** Establish governance at program launch, before scaling across markets or business units, after a material incident, when multiple vendors or teams touch the same data, or when the backlog outgrows informal coordination. Prerequisites are an executive sponsor, program owner, business objectives, named functional approvers, risk categories, and a shared system for tickets and evidence.

**Inputs and access.** Use strategy, prompts, roadmaps, fact and claim ledgers, data inventory, vendor contracts, policies, risk and experiment registers, changes, incidents, dashboards, budgets, and stakeholder directory. Limit access by role and follow retention policy.

## Procedure

1. **Prepare.** Write a concise charter: objectives, non-goals, target audiences, markets, success measures, decision rights, budget guardrails, and review cadence. Assign Responsible, Accountable, Consulted, and Informed roles for each workstream. Define risk tiers and the evidence each tier requires before publication or release.
2. **Diagnose.** Assess current maturity across measurement, technical foundations, entities, evidence, authority, reputation, specialized data, experiences, experimentation, analytics, and governance. Audit ownership gaps, stale assets, duplicated tools, uncontrolled AI use, vendor access, approval delays, and recurring incidents. Separate capability gaps from resource constraints.
3. **Design.** Create a scored intake model using business value, buyer relevance, evidence strength, effort, dependency, reversibility, and risk. Establish stage gates for proposed, ready, in progress, QA, live, measuring, and closed. Define approval and incident matrices, minimum documentation, vendor/data review, model and content-use rules, naming conventions, retention, and exception expiry.
4. **Implement.** Launch one shared roadmap, risk register, decision log, experiment registry, evidence repository, and dashboard. Run weekly delivery review, monthly performance and risk review, and quarterly strategy reset. Train operators on claims, disclosure, privacy, security, accessibility, escalation, and recordkeeping. Remove abandoned access and tools; time-box exceptions with owners.
5. **QA.** Sample completed work against required evidence, approvals, accessibility, data handling, release records, and measurement. Test incident contacts and rollback paths through tabletop exercises. Review vendor outputs for provenance and unsupported claims. Confirm the dashboard reconciles with source systems and that closed items meet Definition of Done.
6. **Measure.** Track value delivery and operating health: priority visibility and revenue outcomes, cycle time, backlog age, approval SLA, rework, escaped defects, incidents, freshness compliance, documentation completeness, experiment learning, vendor performance, and concentration risk. Use trends to change the system, not to punish teams for reporting issues.

- 7. Handoff.** Publish the quarterly decision record: what changed, what worked, what failed, current risks, resource constraints, retired work, and next priorities. Update the playbook and training from verified learning. Ensure new owners accept access, responsibilities, open exceptions, and review dates before transition.

## Operator checklist

- ☐ Charter, objectives, non-goals, and decision rights are current.
- ☐ Every workstream and priority has an accountable owner.
- ☐ Risk tier determines approvals and evidence requirements.
- ☐ Backlog, changes, experiments, decisions, and incidents are recorded.
- ☐ Data and vendor access follow least privilege and review dates.
- ☐ Exceptions have rationale, owner, expiry, and mitigation.
- ☐ Operating reviews produce decisions and assigned actions.
- ☐ Quarterly learning updates the playbook and roadmap.

**Deliverables.** Program charter; RACI; prioritized roadmap; intake rubric; approval and incident matrices; risk and exception registers; governance calendar; decision log; vendor/data review; maturity assessment; quarterly program review; current playbook.

**Definition of Done.** Governance is operating, not merely documented: meetings occur, decisions and risks are recorded, required approvals are visible, audits find no unresolved critical gaps, owners accept the roadmap, and the next review cycle is scheduled.

**KPIs.** Strategic outcome progress; percentage of work with accountable owner; cycle and approval time; backlog age; documentation and freshness compliance; rework and escaped-defect rates; incident frequency and recovery time; exception age; experiment-to-decision rate; vendor SLA and concentration; training completion.

**Escalation triggers.** Escalate any critical security, privacy, safety, legal, accessibility, or reputational event; unapproved regulated claim; systemic data mismatch; vendor breach; repeated missed controls; unresolved owner conflict; budget variance beyond authority; or pressure to hide a negative result or bypass a gate.

**Dependencies.** Executive sponsorship; every operating workstream; legal, privacy, security, accessibility, procurement, finance, engineering, sales, and customer operations.

**Risks and controls.** Bureaucracy is limited with risk-based gates; shadow work with a single intake path; stale policy with quarterly review; accountability diffusion with one accountable owner; vendor lock-in with exportable records and exit plans; learning loss with decision logs and retrospectives; metric gaming with balanced outcome, quality, and risk measures.

**Miniature example.** A client has 46 visibility ideas across three teams, two agencies, and no shared release record. The program owner scores the backlog, assigns RACI roles, and requires only low-risk page edits to use the fast gate; market launches and new agent actions use enhanced review. A weekly meeting clears dependencies, while the monthly review examines results and risk. One low-value reporting tool is retired, schema ownership moves to engineering, and a failed content test is logged as reusable learning rather than quietly repeated.

MEASUREMENT AND LEARNING

# Measurement framework

Use a measurement ladder instead of one visibility score. Foundation metrics explain whether systems can retrieve and interpret the right information. Visibility and citation metrics show whether the brand appears in sampled answers. Behavior and business metrics show whether the work contributes to useful visits, leads and revenue.

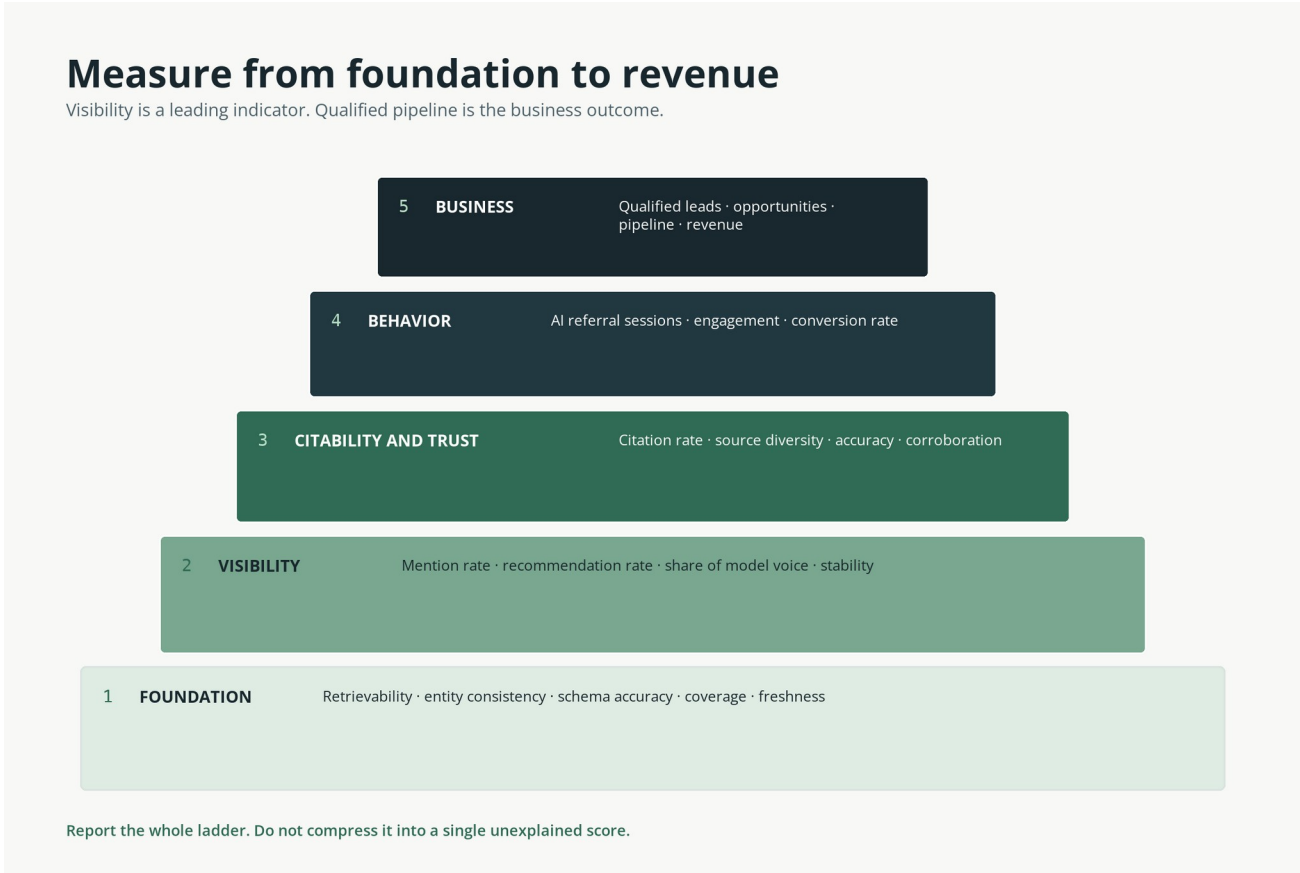


Figure 4 The A/GEO measurement ladder

## Metric dictionary

| Metric                           | Definition                                                                                    | Use and caution                                     |
|----------------------------------|-----------------------------------------------------------------------------------------------|-----------------------------------------------------|
| Eligible prompt coverage         | Share of priority prompts with a valid observation in the period                              | Separates measurement gaps from visibility gaps     |
| Weighted mention rate            | Weighted runs that mention the brand divided by weighted eligible runs                        | Publish weights and keep the cohort stable          |
| Recommendation rate              | Runs that explicitly shortlist or recommend the brand divided by eligible recommendation runs | Do not count neutral mentions as recommendations    |
| Competitive share of model voice | Brand recommendation points divided by all tracked competitor points in the cohort            | Directional; depends on prompt and engine mix       |
| Owned citation rate              | Runs citing an owned URL divided by runs where a citation opportunity exists                  | Define the opportunity denominator before reporting |

| Metric                      | Definition                                                                    | Use and caution                                                       |
|-----------------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| Citation diversity          | Unique qualifying domains and source-class mix                                | Report concentration so one source does not look like broad authority |
| Answer accuracy             | Verified material claims divided by audited material claims                   | Weight critical facts such as price, location and eligibility         |
| Contradiction rate          | Answers containing a material contradiction divided by audited answers        | Triggers correction workflow                                          |
| AI referral sessions        | Sessions from identified AI referrers or tagged AI links                      | Referral data can be missing or grouped as direct                     |
| Qualified AI-assisted leads | Qualified leads with an AI referral, self-report or documented assisted touch | Keep direct and assisted views separate                               |
| Pipeline and revenue        | Opportunity value and revenue connected to the agreed AI-assisted cohort      | Use CRM reconciliation and state attribution limits                   |
| Cycle time                  | Median days from accepted backlog item to verified release                    | Operational measure, not a visibility outcome                         |

## Sampling standard

- [ ] Maintain a frozen benchmark cohort and a rotating discovery cohort.
- [ ] Segment by engine or experience, topic, funnel stage, persona, market, language and device when relevant.
- [ ] Run three to five repeats for high-value prompts when the tool and budget allow.
- [ ] Log exact prompt, date, time, locale, device, account or personalization state and model label when shown.
- [ ] Compare matched cohorts and rolling trends. Annotate platform, model, site and campaign releases.
- [ ] Human-review all critical prompts and a defined sample of the remaining observations.

## Reporting cadence

| Cadence    | Audience                  | Content                                                                                 |
|------------|---------------------------|-----------------------------------------------------------------------------------------|
| Weekly     | Delivery team             | Anomalies, critical corrections, shipped work, blockers and decisions                   |
| Monthly    | Client lead and operators | Cohort trends, citations, site behavior, lead quality, releases and next backlog        |
| Quarterly  | Executive sponsors        | Business outcomes, strategic gaps, source ecosystem changes and resource decisions      |
| Semiannual | Program and risk owners   | Crawler policy, entity truth, schema patterns, measurement design and governance review |

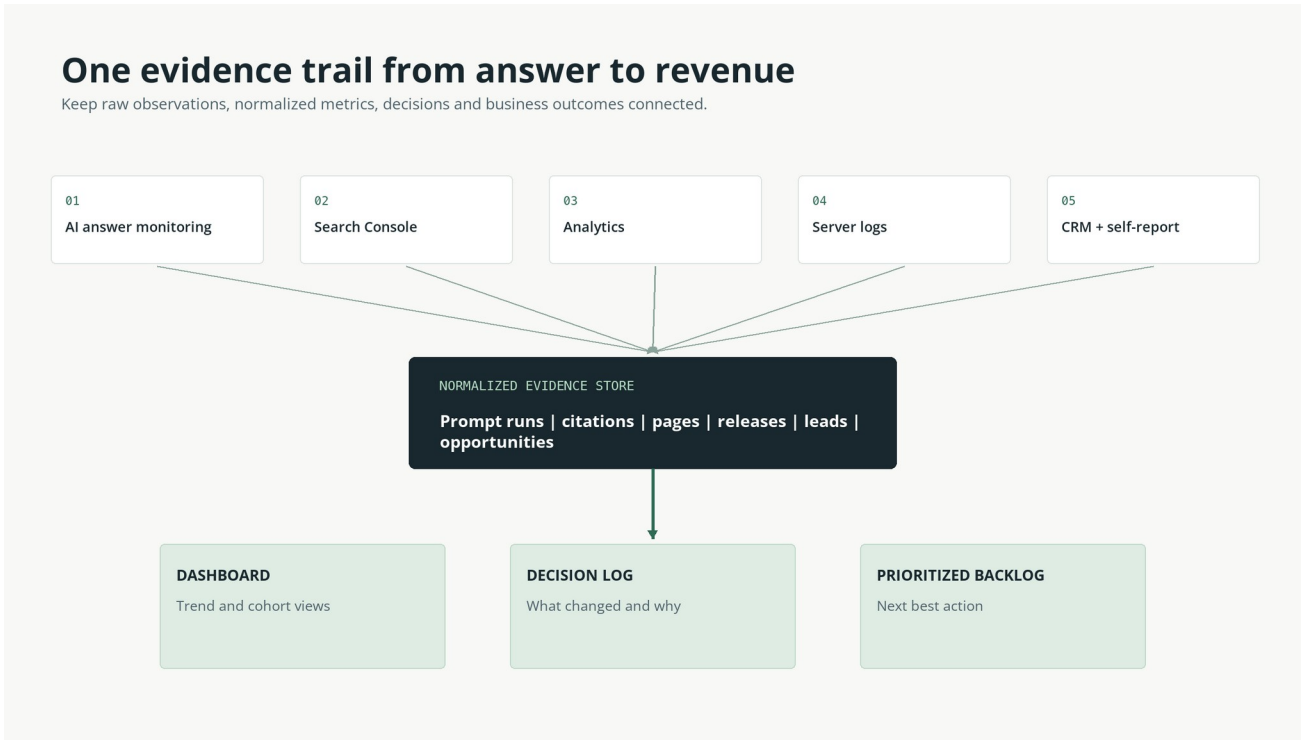


Figure 5 The evidence trail from answer observation to business decision

## DEPLOYMENT

# Ninety day field plan

The first 90 days should establish a credible baseline, remove retrieval and truth blockers, publish distinct evidence and connect visibility to demand. Adjust sequencing for risk, access and existing maturity, but do not postpone instrumentation until after content ships.

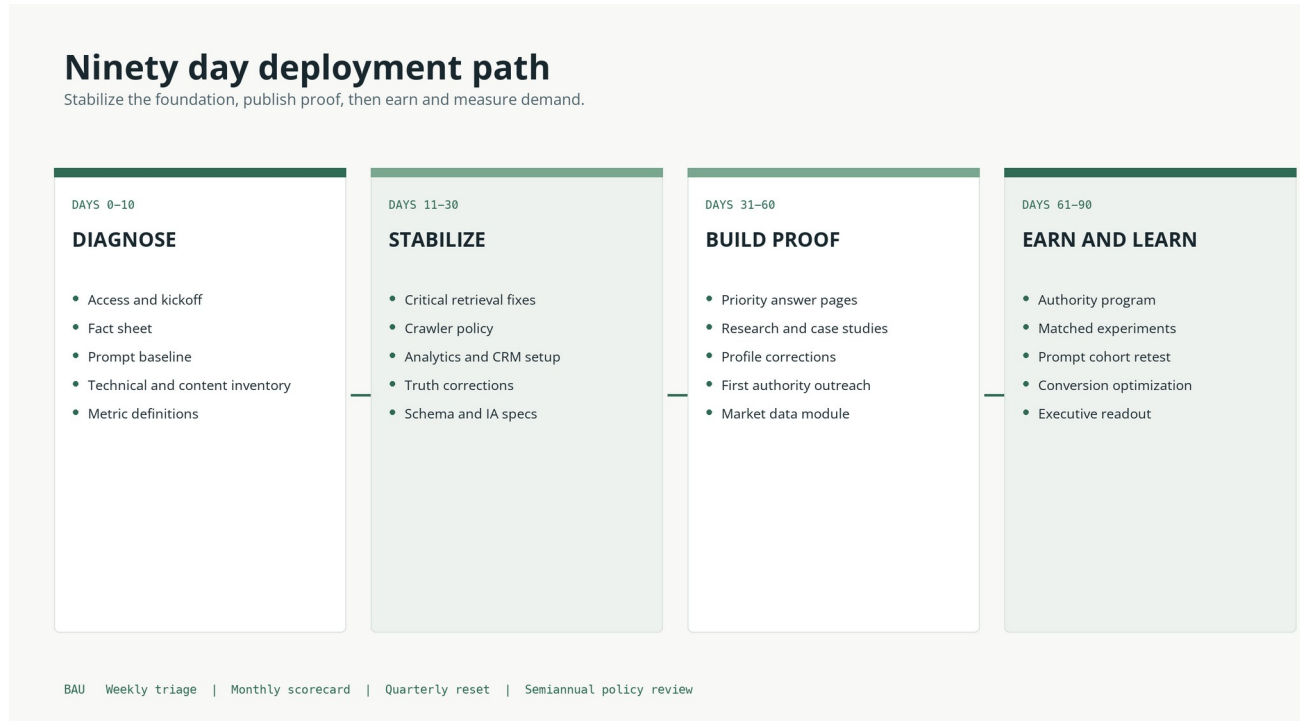


Figure 6 The 90-day deployment path

## Days 0 to 10 Diagnose

- [ ] Complete kickoff, access and risk review
- [ ] Publish the canonical fact sheet
- [ ] Freeze benchmark prompts and run the baseline
- [ ] Inventory technical, schema, entity, content and citation gaps
- [ ] Approve metric definitions and the first backlog

## Days 11 to 30 Stabilize

- [ ] Fix critical crawl, index, rendering and WAF issues
- [ ] Approve separate search, training and user-triggered crawler policies
- [ ] Install analytics, CRM and self-report instrumentation
- [ ] Correct material contradictions across priority surfaces
- [ ] Approve schema, IA and priority content specifications

## Days 31 to 60 Build proof

- [ ] Publish or refresh priority answer pages
- [ ] Produce a case study, research asset or evidence-led expert resource

- [ ] Correct priority profiles and review workflows
- [ ] Launch the first authority outreach cycle
- [ ] Activate the relevant local, international, commerce or vertical module

Days 61 to 90 Earn and learn

- [ ] Expand authority and corroboration work
- [ ] Run matched experiments with documented releases
- [ ] Retest frozen prompt cohorts
- [ ] Improve AI referral and high-intent landing journeys
- [ ] Deliver the executive readout and next-quarter backlog

Steady state calendar

| Frequency             | Required actions                                                                                   |
|-----------------------|----------------------------------------------------------------------------------------------------|
| Daily or event-driven | Triage material misinformation, outages, broken tracking and high-risk reputation events           |
| Weekly                | Run anomaly checks, advance backlog, QA releases, record decisions and surface blockers            |
| Monthly               | Retest the benchmark cohort, reconcile leads, refresh scorecard and reprioritize work              |
| Quarterly             | Refresh discovery prompts, competitors and sources; review outcomes and strategic investments      |
| Semiannually          | Reapprove crawler policy, entity facts, schema templates, key profiles and measurement definitions |

## REUSABLE ARTIFACTS

# Template library

Copy the templates into the client's working system. Keep one accountable owner, one source of truth and a review date for each artifact. The catalog lists the full operating set; the pages that follow provide copy-ready versions of the most-used templates.

| ID  | Template                                      | ID  | Template                           |
|-----|-----------------------------------------------|-----|------------------------------------|
| T01 | Kickoff intake and access                     | T02 | Scope and KPI charter              |
| T03 | Canonical fact and claim evidence sheet       | T04 | Prompt registry                    |
| T05 | Prompt run log and coding rubric              | T06 | Fan-out map                        |
| T07 | Competitor and citation matrix                | T08 | Technical and crawler audit        |
| T09 | Crawler policy decision matrix                | T10 | Remediation ticket                 |
| T11 | Entity graph                                  | T12 | Schema page type and field map     |
| T13 | Schema QA                                     | T14 | Content inventory and coverage map |
| T15 | AI visibility content brief                   | T16 | Claim evidence and answer block    |
| T17 | Subject-matter expert interview               | T18 | Research and case study brief      |
| T19 | Authority outreach tracker                    | T20 | Profile and review register        |
| T21 | Local international and vertical checklist    | T22 | Multimodal and agent task test     |
| T23 | Experiment card                               | T24 | Release QA and rollback            |
| T25 | Metric dictionary and dashboard specification | T26 | Weekly status and decision log     |
| T27 | Monthly executive report and quarterly review | T28 | Incident and correction runbook    |
| T29 | Ninety day roadmap and backlog                |     |                                    |

COPY READY TEMPLATE

# T01 Kickoff intake and access

| Field                                                         | Entry |
|---------------------------------------------------------------|-------|
| Business objective                                            |       |
| Priority audiences and markets                                |       |
| Products services and exclusions                              |       |
| Material claims and regulated topics                          |       |
| Primary competitors                                           |       |
| Web CMS CDN and repository                                    |       |
| Search Console analytics tag manager and CRM                  |       |
| Business profiles directories review sites and media accounts |       |
| Approvers and response times                                  |       |
| Known incidents migrations or launches                        |       |

COPY READY TEMPLATE

# T03 Canonical fact and claim evidence sheet

| Field                  | Canonical value | Public source | Owner | Verified on | Next review |
|------------------------|-----------------|---------------|-------|-------------|-------------|
| Official name          |                 |               |       |             |             |
| Primary category       |                 |               |       |             |             |
| Services products      |                 |               |       |             |             |
| Locations service area |                 |               |       |             |             |
| Price or eligibility   |                 |               |       |             |             |
| Material proof claim   |                 |               |       |             |             |

COPY READY TEMPLATE

# T04 Prompt registry

| ID    | Prompt | Intent | Stage | Persona | Market | Weight | Cohort             |
|-------|--------|--------|-------|---------|--------|--------|--------------------|
| P-001 |        |        |       |         |        |        | Frozen or rotating |
| P-002 |        |        |       |         |        |        |                    |

COPY READY TEMPLATE

# T05 Prompt run log and coding rubric

| Run ID | Prompt ID | Engine | Date and environment | Brand state                | Citations | Accuracy            | Raw record   |
|--------|-----------|--------|----------------------|----------------------------|-----------|---------------------|--------------|
|        |           |        |                      | Absent neutral recommended |           | Pass issue critical | Link or file |
|        |           |        |                      |                            |           |                     |              |

COPY READY TEMPLATE

# T06 Fan-out map

| Parent question | Subquestion | Buyer need | Required evidence | Existing asset | Action                          |
|-----------------|-------------|------------|-------------------|----------------|---------------------------------|
|                 |             |            |                   |                | Improve add create earn correct |
|                 |             |            |                   |                |                                 |

COPY READY TEMPLATE

# T08 Technical and crawler audit

| Check                             | Expected                            | Observed | Severity | Owner | Retest |
|-----------------------------------|-------------------------------------|----------|----------|-------|--------|
| Priority URL status and canonical | 200 and intended canonical          |          |          |       |        |
| Index and snippet eligibility     | Eligible per approved policy        |          |          |       |        |
| Rendered main content             | Important facts in accessible text  |          |          |       |        |
| Crawler and WAF behavior          | Matches approved matrix             |          |          |       |        |
| Sitemap and internal links        | Canonical current URLs discoverable |          |          |       |        |

COPY READY TEMPLATE

# T12 Schema page type and field map

| Template | Primary type                | Stable ID | Required visible fields | Source system | Validator                    | Owner |
|----------|-----------------------------|-----------|-------------------------|---------------|------------------------------|-------|
| Homepage | Organization WebSite        |           |                         |               | Schema.org plus feature test |       |
| Service  | Service WebPage             |           |                         |               |                              |       |
| Article  | Article Person Organization |           |                         |               |                              |       |

COPY READY TEMPLATE

# T15 AI visibility content brief

| Field                                  | Entry |
|----------------------------------------|-------|
| Target buyer question                  |       |
| Primary intent and decision            |       |
| Direct answer in 40 to 70 words        |       |
| Supporting proof and source links      |       |
| Required nuance or limitations         |       |
| Related fan-out questions              |       |
| Original information gain              |       |
| Entity and schema requirements         |       |
| Internal and external links            |       |
| Conversion next step                   |       |
| Author reviewer and refresh date       |       |
| Measurement cohort and acceptance test |       |

COPY READY TEMPLATE

# T19 Authority outreach tracker

| Target source | Audience fit | Asset or angle | Contact owner | Status                       | Live URL | Quality and decay review |
|---------------|--------------|----------------|---------------|------------------------------|----------|--------------------------|
|               |              |                |               | Research pitch live declined |          |                          |
|               |              |                |               |                              |          |                          |

COPY READY TEMPLATE

# T23 Experiment card

| Field                          | Entry |
|--------------------------------|-------|
| Observation and evidence       |       |
| Hypothesis                     |       |
| Fixed cohort and control       |       |
| Primary metric                 |       |
| Guardrail metrics              |       |
| Change and affected surfaces   |       |
| QA owner and release date      |       |
| Minimum observation window     |       |
| Scale iterate or rollback rule |       |
| Result and confidence          |       |
| Decision owner and next action |       |

COPY READY TEMPLATE

# T25 Metric dictionary and dashboard specification

| Metric | Business question | Formula | Source | Segment | Cadence | Owner | Known limitation |
|--------|-------------------|---------|--------|---------|---------|-------|------------------|
|        |                   |         |        |         |         |       |                  |
|        |                   |         |        |         |         |       |                  |

COPY READY TEMPLATE

# T26 Weekly status and decision log

| Field                                   | Entry |
|-----------------------------------------|-------|
| Outcomes and anomalies this week        |       |
| Changes shipped and URLs affected       |       |
| Decisions made and evidence             |       |
| Critical risks or misinformation        |       |
| Blocked work and requested owner action |       |
| Next five priorities                    |       |
| Measurement dates due                   |       |

COPY READY TEMPLATE

# T27 Monthly executive report

| Field                                 | Entry |
|---------------------------------------|-------|
| Business outcome summary              |       |
| Visibility and citation cohort trend  |       |
| Accuracy and material corrections     |       |
| AI referral behavior and lead quality |       |
| Released work and observed effect     |       |
| What did not work and why             |       |
| Next-month investment decisions       |       |
| Risks dependencies and asks           |       |

COPY READY TEMPLATE

# T28 Incident and correction runbook

| Field                                           | Entry |
|-------------------------------------------------|-------|
| Incident ID time and reporter                   |       |
| Affected answer engine market prompt and source |       |
| Severity and customer impact                    |       |
| Verified canonical truth and evidence           |       |
| Owned-source correction                         |       |
| Third-party correction request                  |       |
| Legal privacy or reputation review              |       |
| Retest plan                                     |       |
| Closure evidence and prevention action          |       |

COPY READY TEMPLATE

# T29 Ninety day roadmap and backlog

| Item | Workstream | Business value | Gap | Confidence | Effort | Risk | Dependency | Owner | Target |
|------|------------|----------------|-----|------------|--------|------|------------|-------|--------|
|      |            | 1-5            | 1-5 | 1-5        | 1-5    | 1-5  |            |       |        |
|      |            |                |     |            |        |      |            |       |        |

## QUALITY GATES

# Field checklists

## Before baseline measurement

- ☐ Scope, market, engines and prompt cohorts approved
- ☐ Prompt environment and coding rules documented
- ☐ Canonical business facts verified
- ☐ Competitor set and exclusions approved
- ☐ Raw-response storage and privacy rules confirmed

## Before a technical release

- ☐ Staging result matches the ticket
- ☐ Status canonical robots and sitemap behavior verified
- ☐ Rendered main content works without hidden critical facts
- ☐ Crawler and WAF behavior matches the approved policy
- ☐ Analytics events and annotations verified
- ☐ Rollback owner and trigger recorded

## Before publishing content

- ☐ The page answers the primary question directly
- ☐ Claims have current named evidence
- ☐ Original information gain is clear
- ☐ Author reviewer and refresh date are present
- ☐ Internal links and conversion next step are useful
- ☐ Visible content and structured data agree
- ☐ Accessibility and mobile checks passed

## Before authority or review outreach

- ☐ Target source is relevant and reputable
- ☐ Pitch or request is accurate and personalized
- ☐ Any incentive or material connection is disclosed
- ☐ No fabricated review, link scheme or guaranteed placement
- ☐ Live coverage and correction path will be recorded

## Before monthly reporting

- ☐ Cohorts are matched or differences are disclosed
- ☐ Raw samples and release annotations are complete
- ☐ Visibility, citation, behavior and business levels are all represented
- ☐ Attribution limits and direct traffic are stated
- ☐ Decisions and next actions have owners and dates

## Before handoff

- ☐ Deliverables are in the agreed source of truth
- ☐ Credentials and ownership are transferred safely
- ☐ Open risks and incidents are documented
- ☐ Monitoring and refresh cadence has an owner
- ☐ Next measurement date and decision gate are scheduled

## APPENDIX OPERATOR FIELD GUIDE

# Operator implementation appendix

Run each workstream as a short loop: the agent prepares, a human approves, and the agent records the result in one shared client workspace. This appendix gives each workstream one card with core steps. Run the core steps for every client. The last line of each card names the extra controls for large, regulated or multi-market clients. The workstream pages earlier in this playbook give the full procedure.

## Who does the work

The agent prepares. A human approves. The agent records. An agent can run most of the collection, comparison and record work. A human must approve every fact, claim, release and outside contact. Workstream 1 asks for human review of critical prompts, and Workstream 9 asks for a second person to check calculations.

| Type of task                                                   | Agent               | Human                 |
|----------------------------------------------------------------|---------------------|-----------------------|
| Collect: crawl pages, run prompts, pull exports, list assets   | Does the task       | Spot-checks a sample  |
| Compare: find conflicts, gaps, orphan pages, schema errors     | Does the task       | Reviews the list      |
| Draft: briefs, tickets, schema, alt text, transcripts, pitches | Writes the draft    | Edits and approves    |
| Approve facts, claims, prices and legal text                   | Never               | Always                |
| Publish or deploy a change                                     | Prepares the change | Approves and releases |
| Contact people: outreach, review requests, community posts     | Drafts the message  | Sends the message     |
| Actions that change money, bookings or customer data           | Never alone         | Confirms each action  |
| Record results and evidence                                    | Writes the record   | Signs off at handoff  |

The operator is the person who runs the loop. On a small client, one marketing engineer can be the operator and the approver. On a large or regulated client, the client names a separate approver for facts, legal claims and releases.

## Where the work lives

Keep all work for one client in one workspace, and let the agent and the human write to the same place. Most records share the same IDs, so they fit in seven shared registers. A register is one table with one row per item.

| Register | One row per                            | Workstreams      | Main columns                                                                                              |
|----------|----------------------------------------|------------------|-----------------------------------------------------------------------------------------------------------|
| prompts  | Buyer question                         | 1, 2, 6          | Prompt ID, exact wording, intent, stage, persona, market, set (baseline or rotating), owner               |
| runs     | Check of one question on one AI engine | 1, 6, 10         | Run ID, prompt ID, engine, date, locale, result (absent, mentioned, recommended), cited URLs, answer file |
| pages    | URL or media asset                     | 3, 5, 7, 8, 13   | Page ID, URL, template, role, tier, status, canonical, schema type, inlinks, owner, next review           |
| facts    | Fact or claim                          | 4, 9, 10, 11, 12 | Fact ID, approved wording, proof URL, owner, verified date, next review, risk                             |
| sources  | Outside site, profile or listing       | 6, 10, 11        | Source ID, URL, type, owned or independent, correction path, status, last checked                         |
| backlog  | Work item                              | All              | Item ID, workstream, linked IDs, action, priority score, owner, status, due date, done test               |
| changes  | Release or test                        | 3, 5, 7, 8, 14   | Change ID, expected result, scope, release date, QA result, rollback owner, decision                      |

Add two files next to the registers: `log.md` for decisions, incidents and exceptions, and `metrics.md` for metric and event definitions. Save proof files (raw answers, screenshots, exports) in an evidence folder. Name each file with its record ID and date.

**If agents do most of the work**, use a Git repository with one folder per client. Agents read and write CSV and Markdown files reliably. Git also keeps a dated change history at no extra cost.

```
clients/acme/
  README.md      scope, owners, approvers, next review
  registers/     prompts.csv, runs.csv, pages.csv, facts.csv,
                 sources.csv, backlog.csv, changes.csv
  log.md         decisions, incidents, exceptions (newest first)
  metrics.md     metric and event definitions
  evidence/      RUN-0042-2026-10-29.md, PG-0107-2026-10-29.png
  handoff/       one folder per workstream for the client
```

**If humans do most of the work**, use one Google Sheet with one tab per register and the same column names. Keep the evidence in one shared Drive folder.

Pick one of the two. Do not keep both up to date at the same time, because two copies drift apart. Give each record an ID with a fixed prefix (PR-, RUN-, PG-, FCT-, SRC-, BL-, CHG-) and never reuse an ID.

## How it scales to a site with 100+ pages

Do not work page by page. Work by template and by tier, let the agent do bulk passes, and spend human time on the pages that bring in revenue.

1. **Fix templates, not pages.** A site with 100 or more pages usually runs on a small number of templates. Fix crawl, schema and link problems once in the template. Workstreams 3 and 5 already ask for template-level tickets.
2. **Put every page in a tier.** Tier 1 is the 10 to 20 pages that answer priority buyer questions or bring in leads: every register applies, and a human reviews each page. Tier 2 is the pages that share a template with Tier 1: they get template fixes only, and a human reviews 1 page in 10. Tier 3 is all other pages: the agent watches status, index rules and broken links.
3. **Let the agent do the bulk pass.** The agent crawls, fills the registers and flags exceptions. The human reviews the exceptions and the sample, not every row.
4. **Run only the workstreams that a symptom calls for.** Use the table below. The Ninety day field plan gives the default order.
5. **Ship in batches of 10 to 20 pages.** Give each batch one change record, so you can measure it and roll it back.

Example: a 120-page site has 8 templates, 15 Tier 1 pages, 60 Tier 2 pages and 45 Tier 3 pages. The operator spends most of the time on 15 pages and 8 templates, not on 120 pages. The tier sizes and sample rate are starting points. Change them per client and record the change in `log.md`.

## Pick a workflow

Start from the symptom the client has. Run Workflow 14 for every change, and Workflow 16 once the program has more than one team or market.

| If you see this                                                                   | Run |
|-----------------------------------------------------------------------------------|-----|
| You do not know if AI answers mention the client                                  | 1   |
| You do not know which questions buyers ask                                        | 2   |
| Pages are not indexed, or citations dropped after a site change                   | 3   |
| AI answers get the name, address, leaders or offers wrong                         | 4   |
| Schema errors appear, or a new page template is coming                            | 5   |
| Competitors get the citations                                                     | 6   |
| Pages compete with each other, or priority pages have no internal links           | 7   |
| Pages are thin, old or do not answer the question                                 | 8   |
| Content says what everyone else says, and claims have no proof                    | 9   |
| The client has proof but little outside coverage                                  | 10  |
| Reviews are few, or profiles are unclaimed or wrong                               | 11  |
| Prices, hours or stock are wrong, or a new location or country is coming          | 12  |
| Key knowledge is only in video, audio or PDF, or the client wants an AI assistant | 13  |
| Any change meant to improve AI visibility or conversion                           | 14  |
| AI visibility goes up, but nobody can see the leads or revenue                    | 15  |
| Many people, vendors or markets touch the same work                               | 16  |

## Workstream 1

# AI Visibility Intelligence and Measurement

**Use it when.** You start with a new client, before a big launch, after a visibility change, and each quarter.

**Wait if.** Nobody owns the business goals or the analytics. Get a decision-maker first.

## Steps

1. Human: Approve the buyer questions, markets, AI engines and competitors. Start with 20 to 50 questions.
2. Agent: Run each question on each engine. Save the full answer and a screenshot before you score anything.
3. Agent: Score each answer as absent, mentioned or recommended. Record the cited URLs.
4. Human: Review every high-risk question and 1 in 10 of the rest. Correct wrong scores and log each correction.
5. Agent: Lock the baseline set. Put new test questions in a separate rotating set.
6. Agent: Publish the scorecard with the sample size and what the numbers cannot prove.

**Record in.** prompts, runs, evidence.

## Done when

- [ ] A second person can rebuild one number from the raw answers.
- [ ] Each run has a prompt ID, engine, date and saved answer.
- [ ] The baseline set changes only through a logged decision.

**Hand over.** Question list, scoring guide, raw answers, baseline scorecard, limits note.

**For large or regulated clients.** Two reviewers score the same pilot sample, records reach 95% completeness, and each metric has a written numerator and denominator.

## Workstream 2

## Query Fan-Out and Buyer-Intent Engineering

**Use it when.** You start with a new client, before content planning, when the client enters a market or launches an offer, or when monitoring shows new questions.

**Wait if.** The client has no ideal customer profile or no product list.

### Steps

1. Agent: Collect buyer questions from sales calls, support logs, site search, search data and AI answers. Human: add questions from client interviews.
2. Agent: Split each main question into sub-questions: definition, comparison, cost, risk, proof and next step. Remove sub-questions that need the same answer.
3. Agent: Map each sub-question to a persona, a buying stage and the proof it needs.
4. Agent: Match each sub-question to the best existing page. Mark it keep, improve, merge, create, earn elsewhere or skip.
5. Human: Approve the priority order. Grow an existing page before you create a new one.
6. Agent: Turn each approved row into a backlog item: content brief, tech ticket, research brief or outreach task.

**Record in.** prompts (with main and sub-question IDs), pages, backlog.

### Done when

- [ ] Each priority sub-question has one action, one owner and one target page.
- [ ] No two planned pages target the same intent.
- [ ] Each high-risk claim has a named approver.

**Hand over.** Fan-out map, coverage decisions, priority list, approved briefs.

**For large or regulated clients.** Add questions that buyers ask after they buy, and document the audience difference when two pages look alike.

## Workstream 3

## Technical Discoverability and Retrieval

**Use it when.** You start with a new client, during a migration, redesign, CMS change or CDN (content delivery network) change, or after a sudden drop in indexing or citations.

**Wait if.** The site has no release owner or no rollback path.

### Steps

1. Agent: Crawl the priority templates and URLs first. Do not start with a full-site crawl.
2. Agent: Check each URL for status code, redirects, canonical tag, robots rules, sitemap entry and internal links. Confirm that the main facts show in the rendered page.
3. Human: Approve a crawler policy. Decide separately for search crawlers, AI training crawlers and fetches that a user starts.
4. Agent: Compare robots.txt, CDN rules and firewall (WAF, web application firewall) rules to that policy. Use server logs when you have them.
5. Agent: Group problems by cause. Write one ticket per template, not one per page.
6. Human: Approve and deploy the fix. Agent: retest sample URLs in production and record the result.

**Record in.** pages, backlog, changes.

### Done when

- ☐ Priority URLs return the correct status and canonical, with no redirect chains.
- ☐ The main facts show in the rendered text on desktop and on mobile.
- ☐ Robots, CDN and WAF rules match the approved policy.

**Hand over.** URL audit, crawler policy, tickets, QA results, open risks.

**For large or regulated clients.** Get security approval for each crawler policy change, and keep a log summary for each crawler type.

## Workstream 4

# Entity Brand Knowledge and Information Consistency

**Use it when.** You start with a new client, after a rebrand, merger, leadership change or move, at a new product or location launch, or when AI answers confuse the brand.

**Wait if.** Nobody at the client can approve the facts.

## Steps

1. Human: Interview the owner. Approve the canonical fact sheet: names, founding date, locations, leaders, offers, service area and contact facts.
2. Agent: Give each fact an ID. Attach proof from an owned page and, where possible, from an independent source.
3. Agent: Check priority pages, schema, profiles and listings against the fact sheet. Record the value you saw and where you saw it.
4. Agent: Draft fixes for owned pages first. Human: approve the fixes.
5. Agent: Draft correction requests for outside platforms. Human: submit them through each platform's own process.
6. Agent: Set a review date for each fact. Check the facts again after a rebrand, move or leadership change.

**Record in.** facts, sources, log.

## Done when

- ☐ Each material fact has one value, an owner, proof and a next review date.
- ☐ Priority pages, schema and profiles show no open critical conflicts.
- ☐ Current and former names, owners and leaders are not mixed up.

**Hand over.** Fact sheet, entity map, correction queue, change history.

**For large or regulated clients.** Add persistent IDs, such as Wikidata or business registry entries, only when the client is eligible. Map parent, brand, product and location relationships with dates.

## Workstream 5

## Structured Data and Schema Engineering

**Use it when.** The fact sheet (Workstream 4) and page list exist, a new template is coming, the content model changes, or validation errors increase.

**Wait if.** A schema field has no approved source.

### Steps

1. Agent: List the priority templates. Choose the narrowest accurate schema type for each one.
2. Agent: Map each schema property to visible page content or to a source system.
3. Agent: Set one fixed @id for the organization, website, people, services and locations. Use the same @id on every page.
4. Agent: Build the JSON-LD templates. Test normal, missing-field and multi-location cases in staging.
5. Human: Approve the markup and deploy it with the template release. On WordPress sites, the A/GEO plugin can insert the approved markup.
6. Agent: Validate production URLs. Check them again after each CMS or template change.

**Record in.** pages (schema type, validation result), facts, changes.

### Done when

- [ ] The markup parses and states nothing that the visible page does not show.
- [ ] Each @id stays the same across all pages.
- [ ] A missing value leaves the field out. The template never adds a made-up or old value.

**Hand over.** Page type and field map, JSON-LD templates, validator results, name of the drift-check owner.

**For large or regulated clients.** Keep versioned templates in the repository, and run a scheduled check that compares markup to the visible page and the source data.

## Workstream 6

## Competitive and Citation Source Intelligence

**Use it when.** The priority questions are approved, before PR or partner planning, at a category launch, or when citation patterns change.

**Wait if.** The client has not approved the competitor list.

### Steps

1. Agent: From the runs, record each cited URL exactly as shown, with the claim it supports.
2. Agent: Clean each URL (redirects, tracking codes). Keep the original URL next to the clean one.
3. Agent: Classify each source: owned, news, association, government, academic, review site, directory, community or partner.
4. Human: Review the sources that appear most often, by hand.
5. Agent: Build a table of source by topic. Show where competitors get credit and what proof they use.
6. Human: Choose one action per gap: improve a page, publish proof, correct a record, pitch the source, or watch.

**Record in.** runs, sources, backlog.

### Done when

- [ ] Each priority citation traces to a run, a raw answer and a claim.
- [ ] Each source score shows its parts, not one “authority” number.
- [ ] No action uses paid praise, fake proof or link schemes.

**Hand over.** Competitor list, citation dataset, source scores, gap list, action backlog.

**For large or regulated clients.** Score relevance, independence, evidence quality, freshness and access as separate columns, and recheck link decay each month.

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## Information Architecture and Internal Linking

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**Use it when.** The buyer questions are mapped (Workstream 2), during a redesign or migration, when pages compete for one intent or have no links, or before you add a lot of content.

**Wait if.** You have no crawl of the site or no developer for URL changes.

### Steps

1. Agent: Give each URL a role: hub, service, product, location, proof, guide, comparison, support or conversion.
2. Agent: Find orphan pages, deep pages, dead ends and pages that compete for one intent.
3. Human: Decide each conflict: keep, improve, merge, redirect, relink or retire.
4. Agent: Write the link plan. For each link, give the source page, target page, placement and anchor text.
5. Human: Approve the plan. Agent: deploy it in batches of 10 to 20 pages.
6. Agent: Crawl after each batch. Check redirects, broken links and breadcrumbs.

**Record in.** pages (role, inlinks, orphan flag), backlog, changes.

### Done when

- [ ] Each priority page has a role, an owner, a canonical URL and at least one link path to it.
- [ ] Each merged URL redirects with no loops and no chains.
- [ ] Breadcrumbs, menus, canonicals and sitemaps agree.

**Hand over.** Page role list, redirect map, link plan, QA results.

**For large or regulated clients.** Write URL rules for each page type, including locale and retirement rules, and check logged-out and locale journeys after each batch.

## Workstream 8

## Content Portfolio and Answer Engineering

**Use it when.** The buyer questions and site structure are set (Workstreams 2 and 7), before quarterly content planning, at a launch, or when monitoring shows gaps in coverage, accuracy or freshness.

**Wait if.** No subject-matter expert (SME) can review the content.

### Steps

1. Agent: Group existing pages by buyer intent before you plan any new page.
2. Agent: Grade each page for direct answer, proof, originality, accuracy, freshness and next step.
3. Human: Choose one action per group: keep, refresh, expand, merge, redirect or remove.
4. Agent: Write the brief: question, direct answer, proof needed, limits, links, schema and conversion step. Use the A/GEO order: answer first, explain second, prove third, expand fourth.
5. Agent: Write the draft. Human SME: check every claim. Fix unsupported claims before you edit for style.
6. Agent: Run QA on facts, links, schema, mobile and accessibility. Human: approve and publish. Agent: set the refresh date.

**Record in.** pages, facts (claims), backlog, changes.

### Done when

- [ ] The opening section answers the question correctly, with its limits.
- [ ] Each material claim has current named proof and a reviewer.
- [ ] The page adds something that a generic summary does not.

**Hand over.** Content inventory, briefs, claim sheets, publishing QA, refresh calendar.

**For large or regulated clients.** Add a methodology note and a conflict disclosure where needed, and match each page to a prompt set so you can measure it.

## Workstream 9

## Expertise Evidence and Information Gain

**Use it when.** Priority pages are generic, AI answers cite competitor research, claims have no proof, or a question group has no answer that only the client can give.

**Wait if.** Legal, financial or health claims have no review path.

### Steps

1. Human: Pick one buyer decision that lacks proof. Choose the proof type: case study, benchmark, survey, calculator, dataset or expert note.
2. Agent: Write the evidence brief: question, method, sample, limits and stop conditions.
3. Human: Collect the data or interview the expert, with consent.
4. Agent: Analyze the data. A second person checks the math and the claim wording.
5. Agent: Write the method and the limits before you write any headline.
6. Human: Approve and publish. Agent: add each approved claim to the facts register for reuse.

**Record in.** facts, evidence, log.

### Done when

- ☐ Each headline claim traces to the source data and the method.
- ☐ The sample, period, place and limits are visible to readers.
- ☐ Permissions, licenses and disclosures are recorded before you publish.

**Hand over.** Evidence brief, method, analysis files, claim list, published asset, correction plan.

**For large or regulated clients.** Keep a data dictionary and a reproducible analysis file, and get a privacy review before you collect data.

## Workstream 10

## Citation Earning Digital PR and Authority

**Use it when.** Competitors get most citations, the client has strong proof but little outside coverage, mentions are wrong or have no link, or a launch gives a timely story.

**Wait if.** The client has no approved evidence asset or no spokesperson.

### Steps

1. Agent: List target sources from Workstream 6. Check audience fit and editorial rules before you look for contacts.
2. Agent: Write one angle per source. Use only approved claims from the facts register.
3. Agent: Prepare a proof pack: method, links, expert bio, visuals and disclosures.
4. Human: Send each pitch as a personal message. Respect opt-outs and set a follow-up limit.
5. Agent: When coverage goes live, record it and check names, facts and links. Human: ask for factual fixes only.
6. Agent: At each report, check that the coverage is still live and whether AI answers cite it.

**Record in.** sources, facts, backlog.

### Done when

- [ ] Each target has a documented audience fit. No bulk lists.
- [ ] Each pitch discloses connections, payments and incentives.
- [ ] Nobody promises placement, links or AI citations.

**Hand over.** Source list, outreach log, live coverage register, correction record.

**For large or regulated clients.** Get legal or SME approval for each new claim during fact checks, and report earned coverage apart from paid and partner coverage.

## Workstream 11

## Reputation Reviews Listings and Community Presence

**Use it when.** AI or search results show wrong facts, reviews are few, profiles are unclaimed, negative themes repeat, or competitors have stronger reviews.

**Wait if.** The fact sheet (Workstream 4) or a response policy does not exist.

### Steps

1. Agent: List all official and duplicate profiles. Human: claim each profile and name a backup owner.
2. Agent: Compare each profile to the fact sheet. Draft fixes for wrong facts.
3. Human: Approve a neutral review request. Do not offer incentives, and do not screen out unhappy customers.
4. Agent: Sort incoming reviews by theme and severity. Send product and service problems to the right team.
5. Agent: Draft replies. Human: approve and post them. Move private matters to a private channel.
6. Human: Join relevant communities openly, and state your connection to the brand.

**Record in.** sources (profiles), facts, log.

### Done when

- ☐ Each priority profile has a verified owner, a recovery method and correct facts.
- ☐ Review requests are neutral and follow each platform's rules.
- ☐ Replies show no private customer data.

**Hand over.** Profile list, access record, review request policy, reply library, escalation matrix.

**For large or regulated clients.** Set a response time target, and route safety, legal, fraud and discrimination issues through a written escalation path.

## Local International Commerce and Vertical Data

**Use it when.** A new location, country, language, product line or marketplace is coming, prices, hours or stock conflict, or AI answers recommend an offer that is not available.

**Wait if.** Product or location data has no single source system.

### Steps

1. Human: Pick the module: local, international, commerce or a specific industry. Name the source system.
2. Agent: Give each location, product and offer a stable ID. Write the field dictionary.
3. Agent: Map source fields to feed fields. Test closed, out-of-stock, seasonal and other-locale states.
4. Agent: Pilot 10 records from end to end. Compare the source, the feed, the destination and the landing page.
5. Human: Approve the rollout. Agent: roll out on a schedule that you can pause.
6. Agent: Send rejected or old records to an exception queue. Fix wrong prices and stock first.

**Record in.** facts (or a separate offers register for large catalogs), backlog, changes.

### Done when

- [ ] Each record has a stable ID, an owner and a freshness target.
- [ ] Price, stock, hours and policy facts agree across source, feed and page.
- [ ] Each locale page has the correct language, hreflang and canonical.

**Hand over.** ID list, field dictionary, feed mapping, exception queue, freshness report.

**For large or regulated clients.** Get approval for each market before launch, and set a freshness target for each field type.

# Multimodal and Agentic Experience Readiness

**Use it when.** Key knowledge is mainly in video, audio, images or PDFs, buyers search by image or voice, visitors from AI answers cannot act on the page, the client launches an AI assistant, or repeated support questions could become self-service.

**Wait if.** The client has no approved journey, no owner for human support, or no security and privacy review.

This workstream has two parts. Most clients need only Part A.

## Steps, Part A: make media readable

1. Agent: List the priority videos, audio files, images and PDFs that support a buying decision.
2. Agent: Draft transcripts, captions, alt text, chapter lists and dated chart summaries.
3. Human: Check each text for accuracy. Confirm the rights to use each asset.
4. Agent: Publish the text next to the media on the canonical page.

## Steps, Part B: make one task work (only when the client needs it)

1. Human: Pick one narrow task, such as “book a consultation.” Write what the agent may do and what it must not do.
2. Agent: Draft the capability contract: inputs, checks, confirmation step, failure message and human handoff.
3. Agent: Test bad input, duplicate submissions, prompt injection, timeouts and escalation.
4. Human: Approve a small pilot. Confirm that the kill switch works.

**Record in.** pages (one row per media asset), backlog, changes.

## Done when

- ☐ Each priority media asset has an accurate text version.
- ☐ Each action that changes money, bookings or data needs clear user confirmation.
- ☐ Human handoff works, and a named person can switch off the capability.

**Hand over.** Asset and rights list, transcripts, capability contract, test results, incident runbook.

**For large or regulated clients.** Add a threat model and data-flow map, use least-privilege access and idempotency keys, and keep audit logs that exclude prohibited data.

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# Experimentation Deployment QA and Change Management

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**Use it when.** You make any change meant to improve AI visibility or conversion, or a migration or template edit that touches many pages.

**Wait if.** The change has no baseline or no rollback path.

## Steps

1. Agent: Write the change card before release. State what you saw, what you expect, the one main metric and the decision rule.
2. Agent: List the affected URLs or templates and the QA checks.
3. Human: Approve the change at the level that its risk needs.
4. Agent: Test in staging, including analytics and rollback.
5. Human: Release the change. Agent: record the exact time and scope.
6. Agent: After the agreed window, rerun the matched questions. Write a readout that says keep, change or roll back. Include null results.

**Record in.** changes, backlog, log.

## Done when

- [ ] The change card has a date before the release date.
- [ ] Rollback works, and a named person owns it.
- [ ] Readouts include bad and null results.

**Hand over.** Change cards, QA evidence, readouts, decision log.

**For large or regulated clients.** Release in stages with stop signals, and disclose other changes that ran at the same time.

## Workstream 15

## Conversion Analytics Attribution and Revenue

**Use it when.** Before baseline reporting, a campaign, a conversion redesign or a CRM migration, when AI referrals land in the wrong channel, or when visibility rises but leads do not show it.

**Wait if.** Sales and marketing have not agreed what a lead, a qualified lead, an opportunity and revenue mean.

### Steps

1. Human: Agree on the funnel definitions with sales and finance.
2. Agent: Write each event in `metrics.md`: name, trigger, consent rule and owner.
3. Agent: Set up referrer rules for AI sources, UTM tags, and a “How did you hear about us?” field on forms.
4. Agent: Run test journeys on desktop and mobile. Check that each one shows once in analytics and once in the CRM (for example, HubSpot).
5. Agent: Each month, match analytics leads to CRM records. Human: approve the revenue numbers.
6. Agent: Report direct, self-reported, assisted and modeled views apart. Never count unknown traffic as AI traffic.

**Record in.** `metrics.md`, log.

### Done when

- ☐ Each metric has a definition, a source and a QA record.
- ☐ Each test journey shows once, with the correct source.
- ☐ Pipeline totals match the CRM within the agreed tolerance.

**Hand over.** Event and source definitions, tracking spec, QA evidence, attribution dashboard, limits note.

**For large or regulated clients.** Map consent states and identity joins, and run weekly checks for drops in event volume.

# Program Governance Risk and Continuous Improvement

**Use it when.** The program launches, before you scale to more markets, after a serious incident, when many vendors or teams touch the same data, or when the backlog gets too big to track by hand.

**Wait if.** The client has no executive sponsor.

## Steps

1. Human: Approve the charter: goals, scope, approvers, risk levels and review cadence.
2. Agent: Set up the workspace and the registers. Use one intake path for all work.
3. Human: Apply the review gate for the item's risk level before anyone publishes, deploys, does outreach or runs an agent action.
4. Agent: Prepare the weekly status, the monthly scorecard and the quarterly review.
5. Agent: Each month, check a sample of critical records for proof, approval and freshness. Log gaps. Do not edit history.
6. Human: After each incident, run a short review. Update templates and training.

**Record in.** log, backlog, README.

## Done when

- [ ] Each active item has an owner, proof, risk level and due date.
- [ ] Each decision and incident has a named decider and a date.
- [ ] An audit works without one person's memory or private files.

**Hand over.** Charter, approver list, risk gates, registers, review calendar.

**For large or regulated clients.** Add a RACI matrix with response targets, a vendor register and a semiannual policy audit.

## SHARED LANGUAGE

# Glossary

| Term                   | Working definition                                                                                                                                        |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| AI visibility          | The observable presence and treatment of a brand, product, person or source in AI-assisted discovery experiences.                                         |
| AEO                    | Answer Engine Optimization. Work that makes useful page content easier to select and quote as a direct answer.                                            |
| GEO                    | Generative Engine Optimization. Work that improves how the broader source ecosystem describes, supports and recommends an entity.                         |
| Answer-ready           | Clear, self-contained content that answers a defined buyer question and supplies evidence, context and a next step.                                       |
| Citation opportunity   | A sampled answer where the experience provides source links or where a supporting source is reasonably expected.                                          |
| Crawler policy         | An approved decision about which automated clients may access which resources for search, training or other uses.                                         |
| Entity                 | A distinguishable organization, person, product, service, place or concept with stable attributes and relationships.                                      |
| Evidence ledger        | The maintained record of a claim, its supporting source, owner, verification date and permitted uses.                                                     |
| Fan-out                | A set of related searches or subquestions used to investigate a broader question. A planning model, not a promise of an engine's exact internal behavior. |
| Frozen cohort          | A fixed set of prompts and conditions used for comparable trend measurement.                                                                              |
| Information gain       | Useful information that is distinct from common summaries, such as original data, methods, examples or expert analysis.                                   |
| Material contradiction | A conflicting fact that could affect eligibility, price, location, safety, trust or a buyer decision.                                                     |
| Prompt run             | One recorded execution of one prompt in a defined engine and environment.                                                                                 |
| Recommendation         | An answer that explicitly shortlists, endorses or suggests the tracked brand for the prompt's need.                                                       |
| Retrievability         | The ability of an approved system to access, render, discover and process the intended information.                                                       |
| Rotating cohort        | A changing set of prompts used to discover new questions, competitors and sources without distorting the fixed benchmark.                                 |
| Schema                 | Structured data vocabulary and markup used to express page and entity information. It supports interpretation but does not guarantee AI inclusion.        |

| Term                 | Working definition                                                                                                          |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Share of model voice | A directional comparison of brand presence or recommendation points within a defined prompt and engine cohort.              |
| Source class         | A useful category of source, such as owned site, journalism, association, review platform, directory, community or dataset. |
| Truth drift          | A material fact becoming inconsistent or stale across owned pages, structured data, profiles, feeds or third-party sources. |

## EVIDENCE BASE

## Primary sources and standards

The platform guidance below was reviewed on 26 October 2026. Product behavior, reporting and crawler policies change; verify the live source before deployment.

1. A/GEO Agency website and operating method. <https://ageoagency.com/>
2. A/GEO Agency approach. <https://ageoagency.com/our-approach/>
3. A/GEO Agency services. <https://ageoagency.com/services/>
4. A/GEO Agency machine-readable summary. <https://ageoagency.com/llms.txt>
5. Google Search Central AI features and your website. <https://developers.google.com/search/docs/appearance/ai-features>
6. Google Search Central Optimizing for generative AI features.  
<https://developers.google.com/search/docs/fundamentals/ai-optimization-guide>
7. Google Search Console Generative AI performance report. <https://support.google.com/webmasters/answer/16984139>
8. Google Search Console Click impression and position counting. <https://support.google.com/webmasters/answer/7042828>
9. Google Search Central Structured data guidelines. <https://developers.google.com/search/docs/appearance/structured-data/sd-policies>
10. Google Search Central Spam policies. <https://developers.google.com/search/docs/essentials/spam-policies>
11. Schema.org documentation. <https://schema.org/docs/documents.html>
12. Schema.org validator. <https://validator.schema.org/>
13. IETF RFC 9309 Robots Exclusion Protocol. <https://www.rfc-editor.org/rfc/rfc9309.html>
14. OpenAI Overview of OpenAI crawlers. <https://developers.openai.com/api/docs/bots>
15. OpenAI Publisher FAQ for ChatGPT search. <https://help.openai.com/en/articles/12627856>
16. Google Analytics Custom URLs and UTM campaign data. <https://support.google.com/analytics/answer/10917952>
17. Google Analytics Direct and none traffic. <https://support.google.com/analytics/answer/15258820>
18. W3C Web Content Accessibility Guidelines. <https://www.w3.org/TR/wcag/>
19. FTC Consumer Reviews and Testimonials Rule questions and answers.  
<https://www.ftc.gov/business-guidance/resources/consumer-reviews-testimonials-rule-questions-answers>

## Method boundary

This playbook provides operational guidance. It does not create a guarantee of crawling, indexing, citation, ranking, recommendation or revenue. It is not legal advice. Apply applicable privacy, consumer protection, accessibility, endorsement, industry and licensing requirements with qualified reviewers.

## A/GEO.