Review your firm's visibility in AI-assisted search.

Use this practical companion to define what you want to observe, keep a record another person can inspect and decide which source issues deserve attention. The established article and its publication context stay above. The workbook helps you document a test honestly, including when it has not yet been performed.

Your working output.

A versioned buyer-question set, an observation record and a source-quality action list.

Use the companion tool.

Define exact prompts and versions before testing

Record visible platform and context information without inferring hidden settings

Keep fictional preparation separate from actual observations

Store confidential inputs and account evidence only in approved private systems

Version 1.0. Sources checked 2026-10-28. Open-access planning guidance. Verify your own inputs and professional requirements.

Make the decision with your team.

Begin with questions a buyer would ask.

Choose a service your firm can deliver and a decision that precedes an appropriate enquiry. Build a small question set around that decision: what the service means, when it is useful, how to compare providers and what a buyer should verify. Keep brand-led questions separate from questions that do not name your firm.

Record the surface and the testing context.

An answer belongs to a particular product and context. Record the platform, whether search or browsing was used, the model information visible to you, date and time, language, location assumptions and relevant personalization. If a detail is unavailable, write unknown. Do not infer a hidden model version from the style of the answer.

Source: Searching the web with ChatGPT

Distinguish the observation you found.

A mention names the firm. A citation links to a source page. A recommendation suggests a provider in the answer's context. Use separate observation fields for the mention, citation and recommendation, retaining the cited URL where available, so an answer containing one of those elements is not mistaken for evidence of all three.

Make the decision with your team.

Turn recurring gaps into source work.

Look for a pattern that suggests a useful investigation: an unclear service description, missing expertise, an inaccessible page or contradictory business facts. Confirm the underlying issue directly before assigning a fix. A missing mention in one answer alone does not establish a technical defect.

Source: Google's guide to generative AI search features

Keep reporting categories separate.

Search Console's generative AI report provides impressions for supported Google search features when enough data exists. Microsoft's AI Performance reporting describes citation activity on supported surfaces. Their definitions and coverage differ. Neither should be renamed a universal recommendation rank.

Source: Search Console generative AI performance report, Microsoft AI Performance dashboard

Work through an example.

Illustrative example: recording a question without inventing an answer.

A fictional consultancy defines question C01: What should a finance leader check before choosing post-acquisition integration support? It records version 1, a service-evaluation task and a proposed national buying context. No platform has been queried in this demonstration.

The example observation marks platform, model, answer, mention, citation and recommendation as not tested, and the follow-up action is to obtain an authorized, documented observation. This is a completed example of an honest preparatory record, rather than a fictional response dressed as test evidence.

Adapt the review to professional judgment.

A legal practice's source review might investigate jurisdiction or an outdated attorney profile, using prompts checked for confidentiality and excluding identifiable matter details from the testing process. Marketing staff can record the issue, while the authorized professional decides the appropriate statement.

An architecture studio may discover that a project is attributed to the wrong firm or that a collaborator's role has disappeared. Check the original public project record and permission to reuse images or descriptions. Preserve credit and project status before using the observation to plan new content.

Define the decision.

Blank working page. Record only information approved for this planning file. Add a source or an unknown status where evidence is missing.

Prompt ID

Buyer task

Exact prompt

Prompt version

Service

Record the next action.

Blank working page. Record only information approved for this planning file. Add a source or an unknown status where evidence is missing.

Profession

Buyer task

Proposed question

Version

Use note

Use, review and keep the context.

Use the workbook to keep an inspectable record.

Complete Prompt definitions first. Use Observations for each actual repeat and Evidence links for the source or permitted record. Put confirmed work in Actions. The fictional example remains on a separate sheet, and the Prompt starters sheet contains proposed questions rather than answers.

Record a next review date only when someone can own it. Keep the original observations, note changed conditions and document what a correction verified. If a report is unavailable or an answer cannot be retained, record that limit. The tool remains useful when it prevents a confident conclusion from weak evidence.

Sources.

Google's guide to generative AI search features

https://developers.google.com/search/docs/fundamentals/ai-optimization-guide

Searching the web with ChatGPT

https://help.openai.com/en/articles/9237897-searching-the-web-with-chatgpt

Search Console generative AI performance report

https://support.google.com/webmasters/answer/16984139?hl=en

Microsoft AI Performance dashboard

https://about.ads.microsoft.com/en/blog/post/march-2026/the-ai-performance-dashboard-your-view-into-where-your-brand-appears-across-the-ai-web

Current HTML guide and related reading.

https://www.growthfriday.com/blog/may-2026-issue-2-ai-visibility

Recommendations are planning guidance. Platform documents describe their own surfaces. Fictional examples are not results, tests or benchmarks. Review source changes and professional requirements before use.