

AUDIT + MEASUREMENT

AI Visibility Audit Workbook

A repeatable method for buyer prompts, platform observations, citation mapping, source gaps and 90-day decisions.

BUILT TO BE USED

Decision frameworks

Working registers

Implementation worksheets

2026 FIELD EDITION / 12 PAGES

READ / MARK UP / ASSIGN / REVISIT

HOW TO USE THIS MANUAL

A working document, not a one-page checklist.

Use the explanation on each page to make a decision, then complete the adjacent register or worksheet. Assign owners and dates. Revisit the same pages after a launch, campaign or platform-policy change so the record becomes useful over time.

01

Define the decision before collecting answers.

AUDIT SCOPE

02

Create a stable buyer-question baseline.

PROMPT DESIGN

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Make observations comparable enough to interpret.

RUN PROTOCOL

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Record more than mentioned or missing.

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SOURCE NOTES + LIMITS

AUDIT SCOPE

Define the decision before collecting answers.

Name the market, audience, geography, product scope, competitors, platforms and observation window. The audit should answer a business question, not produce a pile of screenshots.

DECISION PRINCIPLES

- Scope one category or use case at a time.
- Choose platforms based on audience behavior.
- Document account state and location.
- Define what will change after the audit.

ACTION CHECK

- ☐ Name business question.
- ☐ Set geography.
- ☐ Choose competitors.
- ☐ Choose platforms.
- ☐ Set observation dates.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

SCOPE ITEM	VALUE	OWNER

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

PROMPT DESIGN

Create a stable buyer-question baseline.

Build 25 to 40 prompts across discovery, comparison, alternatives, proof, risk and next-step intents. Keep natural variants under the same intent and separate baseline prompts from exploratory questions.

DECISION PRINCIPLES

- Prompt wording can change sources and answers.
- Do not average unlike buyer intents.
- High-intent prompts deserve more weight.
- Freeze the baseline during the observation window.

ACTION CHECK

- ☐ List buyer intents.
- ☐ Write natural variants.
- ☐ Label funnel stage.
- ☐ Assign importance.
- ☐ Freeze baseline set.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

INTENT	PROMPT	WEIGHT

DECISION / NOTES / NEXT REVIEW

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RUN PROTOCOL

Make observations comparable enough to interpret.

Record platform, model or mode, date, account state, location, exact prompt and whether the run was repeated. Save the response and linked sources without assuming repeated answers will be identical.

DECISION PRINCIPLES

- A single run is an anecdote.
- Consistency improves interpretation but cannot remove model variability.
- Preserve exact prompts and timestamps.
- Do not mix logged-in and anonymous runs silently.

ACTION CHECK

- ☐ Record platform.
- ☐ Record timestamp.
- ☐ Save exact prompt.
- ☐ Save response.
- ☐ Save linked sources.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

RUN	CONTEXT	FILE

DECISION / NOTES / NEXT REVIEW

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OBSERVATION LOG

Record more than mentioned or missing.

Capture mention status, recommendation position, description, sentiment, competitors present, source URLs and material factual errors. A yes/no field alone cannot tell the team what to do next.

DECISION PRINCIPLES

- Mention and citation are different fields.
- Accuracy matters more than positive tone.
- Position should be recorded, not overinterpreted.
- Save source URLs before they change.

ACTION CHECK

- ☐ Mark mention status.
- ☐ Record position.
- ☐ Rate description accuracy.
- ☐ Save citations.
- ☐ Flag material errors.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

PROMPT	OBSERVATION	SOURCE

DECISION / NOTES / NEXT REVIEW

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SOURCE GAP

Compare the evidence supporting each brand.

List the pages attached to competitor appearances and the pages attached to your brand. Classify gaps as owned-content fixes, earned-source opportunities, profile corrections or uncertain observations.

DECISION PRINCIPLES

- The same source can play different roles by prompt.
- A competitor citation is a clue, not a placement target by default.
- Check relevance and editorial quality.
- Fix owned facts before pitching outside pages.

ACTION CHECK

- ☐ Group sources by type.
- ☐ Record brands present.
- ☐ Check relevance.
- ☐ Classify the gap.
- ☐ Assign next action.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

SOURCE	BRANDS	GAP

DECISION / NOTES / NEXT REVIEW

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COMPETITOR MATRIX

Compare patterns, not vanity totals.

For each competitor, record prompt coverage, description accuracy, repeated source types, owned pages cited and outside pages cited. Look for durable patterns across intents rather than declaring a winner from one count.

DECISION PRINCIPLES

- Normalize for prompt relevance.
- Separate owned and earned sources.
- Record repeated source domains and exact pages.
- Use totals only with the underlying observations.

ACTION CHECK

- ☐ Select peer set.
- ☐ Count relevant appearances.
- ☐ Map source types.
- ☐ Review description.
- ☐ Write the pattern.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

BRAND	PATTERN	SOURCE

DECISION / NOTES / NEXT REVIEW

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PRIORITIZATION

Choose actions by impact, control and evidence.

Rank findings on buyer importance, expected usefulness, control, effort and confidence. Technical blocks and factual errors often deserve priority; speculative placement ideas need qualification first.

DECISION PRINCIPLES

- High confidence does not always mean high impact.
- Publisher acceptance is not controllable.
- Fix false facts before expanding visibility.
- Name dependencies and evidence needs.

ACTION CHECK

- ☐ Score buyer impact.
- ☐ Score control.
- ☐ Score effort.
- ☐ Rate evidence confidence.
- ☐ Assign owner.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

ACTION	PRIORITY	OWNER

DECISION / NOTES / NEXT REVIEW

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90-DAY ROADMAP

Convert findings into owned deliverables.

Create a sequenced plan with technical fixes, content improvements, evidence development, source qualification and outreach. Each line needs a deliverable, owner, due date and validation method.

DECISION PRINCIPLES

- Schedule prerequisites first.
- Keep baseline measurement stable.
- Define deliverables, not aspirations.
- Annotate every major release.

ACTION CHECK

- ☐ Choose top actions.
- ☐ Sequence dependencies.
- ☐ Assign owners.
- ☐ Set due dates.
- ☐ Define validation.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

WINDOW	DELIVERABLE	VALIDATE

DECISION / NOTES / NEXT REVIEW

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MONTHLY READOUT

Explain what changed and what it means.

Report baseline changes by prompt intent and platform, then inspect the source layer. Separate observed movement from causal interpretation and end with keep, fix, pursue or watch decisions.

DECISION PRINCIPLES

- Do not attribute movement without evidence.
- Retain unchanged metrics as context.
- Record platform and model changes.
- Close with the next decision.

ACTION CHECK

- ☐ Rerun baseline.
- ☐ Compare observations.
- ☐ Inspect source changes.
- ☐ Explain limits.
- ☐ Assign next step.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

FINDING	INTERPRET	DECIDE

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

SOURCE NOTES + LIMITS

Keep the claim attached to its source and its limit.

A field manual should make the work repeatable without turning research into certainty. Record the original source, publication date, exact claim, population or platform studied, and the boundary between a documented finding and your team's interpretation.

DECISION PRINCIPLES

- Link to original documentation or research whenever it is available.
- Separate a platform requirement from a community convention or agency recommendation.
- Do not convert correlation, a case example or an illustrative score into a guarantee.
- Recheck crawler, schema and search guidance before implementation because platforms change.

ACTION CHECK

- ☐ Record the source URL and access date.
- ☐ Copy the exact claim in your own words.
- ☐ Note the methodology or platform scope.
- ☐ Write the practical implication separately.
- ☐ Set a date to revalidate the guidance.

EVIDENCE LEDGER

Use one row per claim. The evidence column should name the original document, not a secondary summary.

CLAIM	SOURCE	LIMIT

DECISION / NOTES / NEXT REVIEW

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