TOOL 1: QUESTION LIST

CHAPTER 5

Write the questions people ask before they hire you, in their words, not yours. Aim for fifteen to twenty-five. Then mark the eight you will track every month (Tool 9).

#	The question, in the customer's words	Stage*	Leads to work I want? (Y/N)	Page that answers it (URL)	Answered fully? (Y/Partly/No) | Track monthly?
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

* Stage: I = Information (what is it, do I need it?) M = Matching (what kind of help fits?) S = Selection (who should I choose?)

TOOL 1: QUESTION LIST (CONTINUED)

CHAPTER 5

Write the questions people ask before they hire you, in their words, not yours. Aim for fifteen to twenty-five. Then mark the eight you will track every month (Tool 9).

#	The question, in the customer's words	Stage*	Leads to work I want? (Y/N)	Page that answers it (URL)	Answered fully? (Y/Partly/No) | Track monthly?
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					

* Stage: I = Information (what is it, do I need it?) M = Matching (what kind of help fits?) S = Selection (who should I choose?)

TOOL 2: YOUR FOUR ANSWERS

CHAPTER 6

Write each answer in one or two plain sentences. Put them on your website as ordinary text, at the start of your bio, and in every profile description you control.

Who I am

Name, credential, firm, town

What I specialize in

In clients' words, plus proper names of services

Who I serve, and where

Kinds of clients; towns, counties, or areas

When I am the right choice, and when I am not

Situations where I am the best fit; one honest line about what I do not do

Check: Could a competitor say exactly the same thing? Make the answers more specific where needed.

TOOL 3: MASTER RECORD

CHAPTER 6

The facts that should be identical everywhere. Keep this as the one source you check every listing against.

Fact	Exactly as it should appear
Business name	
Your name (with credentials, as you are known)	
Address(es)	
Areas served	
Phone	
Website	
Hours	
Main specialty (your chosen wording, Chapter 5)	
Services (proper names)	
Credentials and license numbers	
Professional memberships and associations	
Year established / years in practice	
How you are paid / pricing basis (where relevant)	

Date last checked: _____

TOOL 4: LISTINGS INVENTORY

CHAPTER 6

Check your website, main business profile, licensing or regulator record, directories, review sites, association pages, and former employers where relevant. Re-check several times a year.

Where	URL	Name correct?	Address/phone correct?	Specialty matches?	Credentials correct?	Complete or thin?	Action needed	Done (date)

TOOL 4: LISTINGS INVENTORY (CONTINUED)

CHAPTER 6

Check your website, main business profile, licensing or regulator record, directories, review sites, association pages, and former employers where relevant. Re-check several times a year.

Where	URL	Name correct?	Address/phone correct?	Specialty matches?	Credentials correct?	Complete or thin?	Action needed	Done (date)

TOOL 5: CONNECTION MAP

CHAPTER 6

List each meaningful connection, write it as a plain sentence, and note where it already appears and where it should appear.

Connection type	Connection	The sentence	Where it appears now	Where it should appear
Place served				
Kind of client				
Situation handled				
Credential				
Association / board / community group				
Professional partner				

Where helpful, write the key connections the other way round: "For [kind of client], [service] means..."

TOOL 6: WHO ELSE SAYS SO?

CHAPTER 7

The deletion test: Imagine your website disappeared. For each thing you most want AI to say about you, who else says it?

What I want AI to say about me	Where it is said by someone other than me (profile, review, article, association, partner)	Number of independent sources	Next step

Any row with no independent source is a claim without a witness. Start there.

TOOL 7: WHERE AI LOOKS

CHAPTER 7

Ask two or three AI assistants that show sources about your most important questions. Record what they cite. Repeat every few months.

Question	Assistant	Date	Sources cited	Mentions me?	Mentions competitors?	Am I present on this source?

Sources that keep appearing:

Sources that mention competitors but not me:

TOOL 8: REVIEW GAP

CHAPTER 7

Read through your reviews and tally what they actually mention. Compare that with what you want to be known for.

What reviews mention	How often	Is this what I want to be known for?
Services		
Kinds of client		
Places		
Situations / outcomes		

My review gap: what I want to be known for, minus what reviews actually say =

Health professionals: reply generically and never confirm that someone is a patient.

Next steps:

TOOL 9: MONTHLY CHECK - SETUP

CHAPTER 8

Choose eight tracked questions, two AI assistants, and two tries for each question. Save the raw answers and repeat monthly.

#	Question type	Exact question (do not change wording from month to month)
1	By name	
2	Category and place	
3	Situation 1	
4	Situation 2	
5	Situation 3	
6	High-intent need	
7	In a customer's own words	
8	Follow-up after question 2	

My two AI assistants:

My control question(s) for this round (Tool 13):

Run protocol: same day each month | fresh conversations | personalization off when possible | two tries per question | follow-up directly after question 2 | save full text

TOOL 9: MONTHLY TRACKING SHEET (1 OF 2)

CHAPTER 8

One row per answer. 32 rows per month = 8 questions x 2 assistants x 2 tries. The follow-up shares a conversation with question 2.

Date	Assistant	Version	Question #	Try (1-2)	Named?	Answer state*	Described correctly?	What it said I am for	Competitors named	Sources shown	Notes

* First Call | Outranked | Comparison | Neutral Mention | Absent

TOOL 9: MONTHLY TRACKING SHEET (2 OF 2)

One row per answer. 32 rows per month = 8 questions x 2 assistants x 2 tries. The follow-up shares a conversation with question 2.

Date	Assistant	Version	Question #	Try (1-2)	Named?	Answer state*	Described correctly?	What it said I am for	Competitors named	Sources shown	Notes

* First Call | Outranked | Comparison | Neutral Mention | Absent

TOOL 9: MONTHLY SUMMARY

CHAPTER 8

Write results as fractions, not precise-looking visibility percentages. Compare each assistant separately. Look for patterns over three months.

Month	Assistant	Named (__ of 32 total)	First Call (__ of 32 total)	Described correctly (__ of __ named)	Assistant update noticed?	Notes

Reading rules: treat a change of a handful of answers as noise. Do not judge a trend until you have three months.

TOOL 10: SIX-BLOCK AUDIT

CHAPTER 9

Mark each building block S (Strong), W (Weak) or ? (Don't know), and write one line on why.

Building block	Checks	Mark (S/W/?)	Why
Query Coverage	A page that actually answers each question on my list; all three stages covered; focused pages, not one catch-all or dozens of thin copies; real-situation accounts and honest comparisons		
Retrieval Eligibility	Key facts in plain words on my own site; crawlers not blocked at any layer; text and links visible without scripts; pages linked, in sitemap, and indexed		
Embedding Alignment	Vague phrases gone; one wording for my specialty everywhere; proper names and everyday words side by side; each service explained, not just listed		
Entity Relationship Structure	Four answers on site and in profiles; listings match master record; connections written as sentences; a bio for each professional		
Fragment Quality	Key facts pass pull-out test; headings phrased as client questions; answer in the first sentence		
Citation Reliability	Deletion test passed; independent source for each key claim; reviews mention specifics; present on sources AI cites for competitors; category concern addressed		

TOOL 11: BREAK-POINT CHECK

CHAPTER 9

For one important question where you are absent. Stop at the first "No."

Step	Question	Yes / No	If no, fix
1	Can AI fetch and read the page that should answer this question, including its key facts?		Retrieval Eligibility
2	Is the page being found for this question at all (cited for related questions, appearing in searches for smaller questions, showing in any AI reports)?		Query Coverage, Embedding Alignment
3	Found but not used: does the page appear among sources or in searches, while AI names someone else?		Fragment Quality, Entity Relationship Structure, Citation Reliability

Priority question:

First break point / finding:

Proposed next action:

TOOL 12: COMPETITOR EVIDENCE COMPARISON

CHAPTER 9

Compare your evidence with businesses AI names often for an important question. This shows where your evidence is thinner; it does not prove which gap decides the answer.

Evidence check	Me	Business AI names (1)	Business AI names (2)
A page answering this question?			
Specific claims, not vague ones?			
Four answers stated plainly?			
Listings consistent?			
Reviews mention this service or situation?			
Present on the sources AI cites?			
Third-party mentions?			
Original information?			

Question being compared: _____

TOOL 13: FIX LOG

CHAPTER 9

One change at a time. Write it down the day you make it, then note the first month each AI assistant reflected it.

Date	What changed	Where (URL / listing)	Building block	Question(s) it should affect	Who	First month each assistant reflected it (A/B)

Control questions this round (do not work on these):

Other changes that might affect results (redesign, hosting, new listing, assistant update):

TOOL 13: FIX LOG (CONTINUED)

One change at a time. Write it down the day you make it, then note the first month each AI assistant reflected it.

Date	What changed	Where (URL / listing)	Building block	Question(s) it should affect	Who	First month each assistant reflected it (A/B)

Control questions this round (do not work on these):

Other changes that might affect results (redesign, hosting, new listing, assistant update):

TOOL 14: THE AUDIT ON ONE PAGE

CHAPTER 9

A complete checklist for the repeatable GEO audit.

Done	Stage	What to do
	1. Get ready.	Question list (Tool 1), four answers (Tool 2), master record (Tool 3), listings inventory (Tool 4).
	2. Baseline.	Ask AI who you are: by name, by business, by need. Run your first monthly check (Tool 9). Save everything.
	3. Diagnose.	Six-block audit (Tool 10), break-point check (Tool 11), competitor evidence comparison (Tool 12).
	4. Fix the weakest link.	Resolve every unknown, gates first, then biggest gap. Make one change at a time. Log it (Tool 13). Keep one or two control questions untouched.
	5. Re-measure.	Monthly check, same way. Compare with baseline, assistant by assistant. Note when each reflects change. Read trends, not single results.
	6. Repeat.	Return to step 3. Full audit every few months; monthly check in between.

TOOL 15: QUESTIONS TO ASK ANYONE YOU HIRE

CHAPTER 8 AND CONCLUSION

If you bring in an agency, consultant or software tool for AI visibility, ask these questions.

Topic	Questions to ask	Their response / notes
Measurement	Which questions will you track, and can I see them? Which AI assistants, tested separately? How many times is each question asked, and how often is it re-run? Can I see the actual answers, not just a score? How much would the number move by chance?	
Diagnosis	What will you fix first, and why? How will you tell whether a change worked rather than the assistant changing?	
Method	Will you change one thing at a time, keep control questions, and log every change with a date?	
Honesty	Do you guarantee placement in AI answers? (If yes, walk away.) Will any part of your work involve writing reviews, buying mentions, or creating listings for businesses that do not exist? (If yes, walk away.)	
Plain English	Can you explain what you are doing, and why, in plain words?	