DECISION-READY REPORTING / 14 OCTOBER 2026

AEO/GEO Sample Report

From AI-search visibility to a prioritised, accountable content and measurement plan.

Insurance. Retail. Ecommerce. Banking.

A standalone report designed for marketing, product and procurement teams. Read the executive decisions first, then inspect the metrics, evidence and scored actions.

480	466	183	12
sample attempts	valid sample records	sample claims	scored actions

Three decisions the sample makes visible

- Correct material eligibility and policy-exclusion content before expanding promotion. These sample scenarios trigger P0 review.
- Keep mention, recommendation and citation rates separate. Every metric retains its own eligible denominator.
- Give every change an owner, scored priority, source reference and measurable acceptance check.

How to read this report

The figures are recomputed from a synthetic demonstration dataset. They are not customer results, live model tests, sector benchmarks, before/after changes or forecasts. Proposed prompts and copy below are concrete examples awaiting execution and approval.

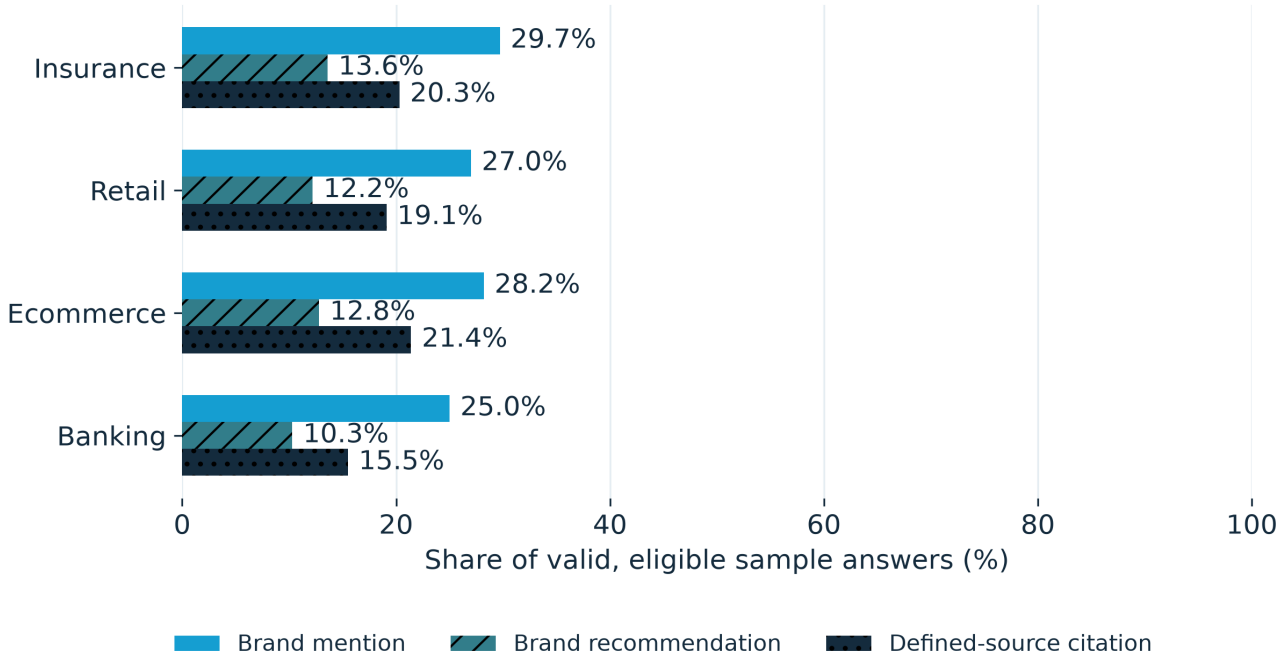
Reader path: overview and metrics • ranked backlog and scoring • sector implementation cards • 30/60/90-day plan • definitions and references



01 / VISIBILITY AND DISCOVERY

Separate the three signals

Being mentioned, being recommended and receiving a source citation represent different outcomes. These figures use explicit definitions rather than an opaque combined visibility score.



Source: Sample runs dataset. Separate fictional sector panels; original questions are not retained. Illustration only, not relative sector or platform performance.

Sector	Valid / attempts	Mention	Recommend	Cite defined source
Insurance	118 / 120	35 / 118	16 / 118	24 / 118
Retail	115 / 120	31 / 115	14 / 115	22 / 115
Ecommerce	117 / 120	33 / 117	15 / 117	25 / 117
Banking	116 / 120	29 / 116	12 / 116	18 / 116

Measurement rule

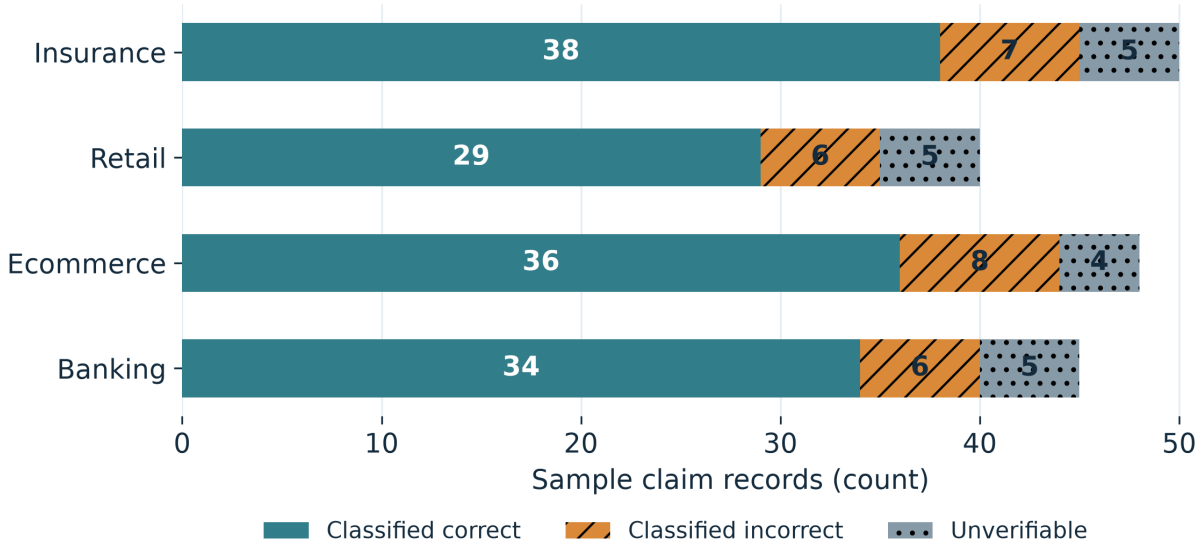
The sample recommendation denominator contains valid records explicitly marked recommendation-eligible. Citation means a displayed link to one of the predefined sample sources. Failed records remain in the run-quality report and are excluded from answer-based rates.

A citation is not a click; a click is not a conversion. No traffic, enquiries, purchases, store visits or application outcomes are measured here.

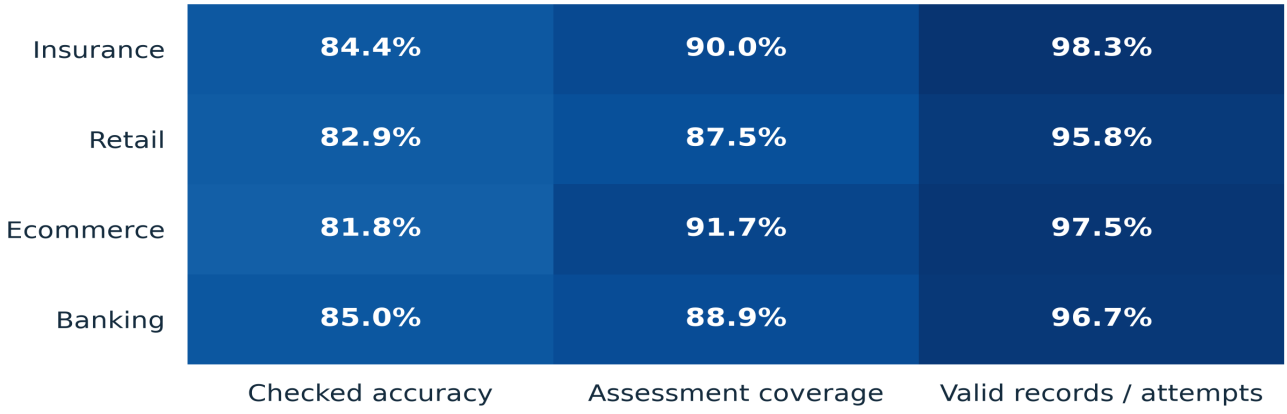
02 / ACCURACY AND EVIDENCE

Visibility needs factual control

The sample separates an incorrect claim from an unverifiable claim. A missing source is an evidence gap, not proof that a claim is false.



Classifications were assigned locally for demonstration. No live customer or product verification was performed. Totals: 137 correct, 27 incorrect and 19 unverifiable sample claims.



Use accuracy together with coverage

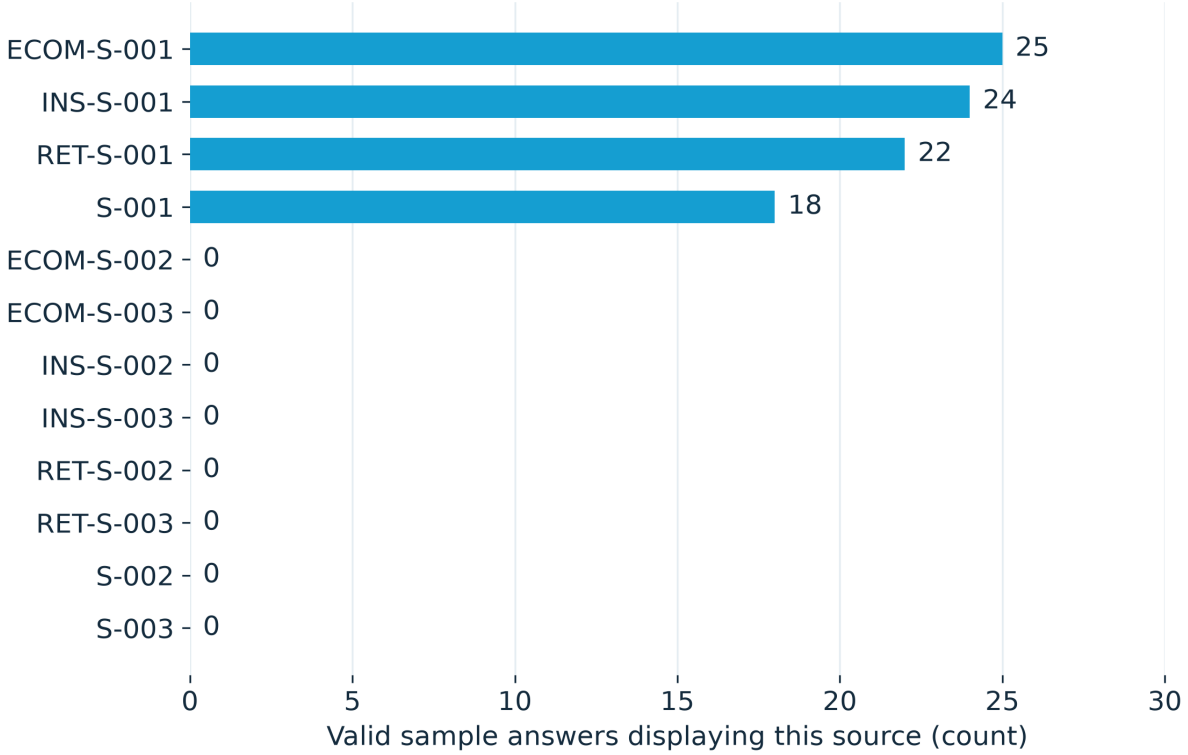
Checked accuracy = correct / (correct + incorrect). Assessment coverage = (correct + incorrect) / all sample claims. The 19 unverifiable claims stay visible rather than making checked accuracy look artificially complete.

Run success = valid records / all attempts: 466 / 480 (97.1%). The 14 failed records require a separate reason and rerun log in a live audit.

03 / SOURCE LANDSCAPE

Show which evidence is visible

Four of the twelve registered sample sources appear in displayed citations. Eight remain catalogue-only records. A source not being cited is not, by itself, evidence of a content fault.



Source IDs omit the SAMPLE- prefix for readability. Each sample answer has at most one displayed citation; counts are not deduplicated domain share of voice. All source URLs are N/A because the records are fictional.

Source inventory	Displayed citation	Linked assessable claims
Insurance	1 / 3 registered sources	45
Retail	1 / 3 registered sources	35
Ecommerce	1 / 3 registered sources	44
Banking	1 / 3 registered sources	40

Translate source gaps into a review task

A live report preserves the exact displayed URL and relevant passage, checks its validity for the product, variant, location and version, and records the owner. Visited search sources and links cited in the final answer are separate records.

04 / THE RANKED BACKLOG

Concrete changes, transparent order

P0 is a material-condition review gate. Remaining work is ordered by the score. Ratings, effort and dates are illustrative planning judgements rather than measured returns.

ID / sector	Action to implement	Priority	Score /100	Effort days
BANK-01 Banking	Place eligibility beside account suitability guidance	P0	85.0	1-2
INS-01 Insurance	Make exclusions visible beside policy suitability answers	P0	85.0	1-2
ECOM-01 Ecommerce	Attach specifications to the selected variant and SKU	P1	71.3	1-2
RET-01 Retail	Separate online stock, store stock and pickup eligibility	P1	71.3	1-2
BANK-02 Banking	Replace unverified account statements with sourced facts	P2	56.3	2-3
ECOM-02 Ecommerce	Source delivery and returns copy from the current offer	P2	56.3	2-3
INS-02 Insurance	Replace unsupported quote statements with source-owned facts	P2	56.3	2-3
RET-02 Retail	Give pickup answers an accountable store/service source	P2	56.3	2-3
BANK-03 Banking	Add process questions with source-specific capture	P3	40.0	3-5
ECOM-03 Ecommerce	Add offer freshness checks to a matched monitoring panel	P3	40.0	3-5
INS-03 Insurance	Add a claim-reporting FAQ and matched follow-up questions	P3	40.0	3-5
RET-03 Retail	Create a store-hours FAQ and replay local-source checks	P3	40.0	3-5

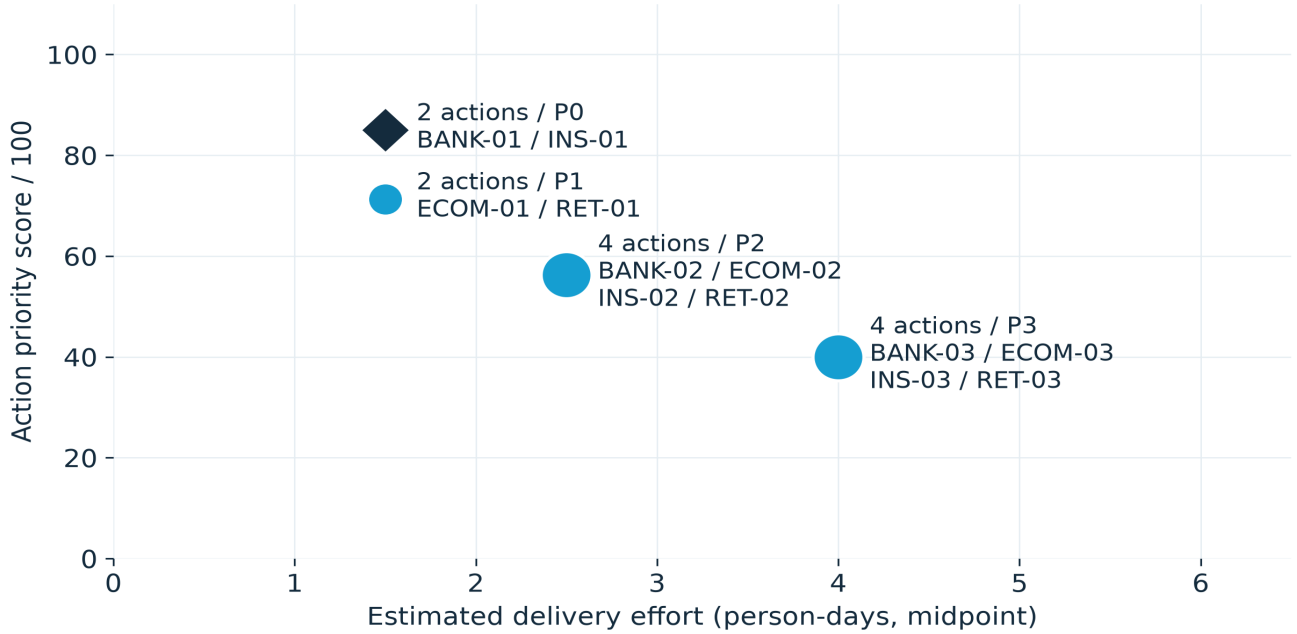
Priority does not promise an uplift

The score expresses implementation priority within this sample. It is not an AI-platform score, market benchmark, probability of success or projected financial result. Detailed recommendations and acceptance checks follow by sector.

05 / SCORING AND DELIVERY EFFORT

Make the trade-offs inspectable

Diamond markers identify P0 scenarios. A high score with lower effort is a useful sequencing signal, subject to dependencies and mandatory factual review.



Each point groups actions with the same score and effort estimate; marker area indicates their count. Effort is an estimate, not observed time or a commercial quote. No correlation or causal effect is inferred.

HolistiCRM sample prioritisation rubric

$$100 \times [0.30\times(I-1)/4 + 0.25\times(U-1)/4 + 0.20\times(R-1)/4 + 0.15\times(C-1)/4 + 0.10\times(5-E)/4]$$

I = impact (30%); U = urgency (25%); R = reach (20%); C = evidence confidence (15%); E = effort (10%, reversed).

Ratings use a 1-5 ordinal scale. Evidence confidence is capped at 3/5 in this synthetic sample and is not a statistical confidence interval. Reach is an assumed content scope, not measured audience volume. Ease reverses effort so larger effort does not increase priority.

P0 overrides the numeric ranking

INS-01 and BANK-01 demonstrate exclusion/eligibility triage, not live incidents. A real P0 requires an accountable reviewer to confirm materiality against a dated approved source and complete captured answer. The numeric score remains unchanged.

P1: score 70 or more, by day 30. P2: score 50 to under 70, by day 60. P3: below 50, by day 90. P0 sample triage: days 1-7.

06 / SECTOR IMPLEMENTATION

Insurance / INS-01

INS-01 / P0 / SCORE 85.0/100

Make exclusions visible beside policy suitability answers

Owner: Insurance product owner + compliance reviewer + content editor | Effort: 1-2 person-days | Target: day 7

Evidence and source gap

Fictional suitability guidance omits an exclusion. Assigned INCORRECT / ASSESSABLE_OMISSION_OR_CONTEXT_ERROR; not an actual expert finding.

Only a fictional source description exists, with no usable URL or approved document. Obtain the dated applicable source and exact paragraph/field before a real condition correction.

run: SAMPLE-INS-R-039 | claim: SAMPLE-INS-C-039 | source: SAMPLE-INS-S-001

Implement this change

Add the current policy/version and a plain-language exclusions pointer immediately beside the suitability summary. Link the exact approved policy section. Remove blanket-cover wording until the product owner verifies it.

Target question - proposed, NOT RUN
Which insurance options should I compare for a trip, and which exclusions should I verify before requesting a quote?
Persona: Customer comparing cover before requesting a quote | Intent: Unbranded suitability/selection recommendation

Sample FAQ: Does this policy cover every cancellation reason?

Coverage is defined by the current policy wording, including exclusions and limits. Check the exact policy version and its linked exclusions section, and ask the insurer to confirm how it applies to your circumstances.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Coverage and the applicable exclusion are explained together in the same approved answer block.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 5, urgency 5, reach 4, evidence confidence 3, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Insurance / INS-02

INS-02 / P2 / SCORE 56.3/100

Replace unsupported quote statements with source-owned facts

Owner: Insurance product/content owner + evidence reviewer | Effort: 2-3 person-days | Target: day 60

Evidence and source gap

5 claims in this sector are assigned UNVERIFIABLE with blank Source_ID. These examples show missing evidence, not a proven false condition.

Referenced claims have no source link. Catalogue targets indicate the approved material required, but are not sources cited by those claims and contain no real facts.

run: SAMPLE-INS-R-046, SAMPLE-INS-R-047 | claim: SAMPLE-INS-C-046, SAMPLE-INS-C-047 | missing_source_claim: SAMPLE-INS-C-046, SAMPLE-INS-C-047 | catalogue_target_source: SAMPLE-INS-S-002

Implement this change

Create a quote-process fact block with an accountable owner, approved source locator, version and review date. Separate indicative quote information from policy conditions. Source-missing claims cannot supply real coverage promises.

Target question - proposed, NOT RUN

How do I compare an indicative insurance quote with the final policy documents?

Persona: Customer moving from comparison to a quote | Intent: Condition/source verification

Sample FAQ: Is an indicative quote the same as confirmed insurance cover?

An indicative quote describes an offer stage. Before purchase, review the final documents for the cover, limits, exclusions and effective dates that apply to the selected policy. Ask the provider which approved documents govern the offer.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Reclassify every linked unknown claim against the approved source as correct, incorrect or still unverifiable; retain the locator and unresolved status.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 4, urgency 3, reach 3, evidence confidence 2, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Insurance / INS-03

INS-03 / P3 / SCORE 40.0/100

Add a claim-reporting FAQ and matched follow-up questions

Owner: Claims operations content owner + AEO analyst | Effort: 3-5 person-days | Target: day 90

Evidence and source gap

Only 24/118 valid synthetic answers display a defined-source citation. SAMPLE-INS-S-002, SAMPLE-INS-S-003 are catalogue-only. Example runs have no defined-source citation; no specific real topic gap is proven.

Original question/persona is absent. Unused catalogue descriptions contain no process facts. Obtain the approved topic source and define a separate extension question panel before testing.

run: SAMPLE-INS-R-025, SAMPLE-INS-R-026 | catalogue_target_source: SAMPLE-INS-S-002, SAMPLE-INS-S-003

Implement this change

Build a claim-reporting FAQ linked to the approved process. Add separately labelled NOT_RUN questions for reporting channel, required information and status enquiries. Retain complete answers and displayed citations in the next matched measurement.

Target question - proposed, NOT RUN
Where should a policyholder start a claim, and which official process page should they check?
Persona: Policyholder looking for an operational next step | Intent: Process/navigation monitoring; proposed extension

Sample FAQ: What should I have ready when reporting a claim?

Use the insurer's current claim-reporting page to find the reporting channel and required information for your claim type. Requirements can differ; check the relevant process and ask the insurer to confirm missing details.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Map the proposed journey/process source and capture the proposed question in a separately labelled extension panel before comparing it with the baseline.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 3, urgency 2, reach 3, evidence confidence 2, effort 3

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Retail / RET-01

RET-01 / P1 / SCORE 71.3/100

Separate online stock, store stock and pickup eligibility

Owner: Retail catalogue owner + store operations + content editor | Effort: 1-2 person-days | Target: day 30

Evidence and source gap

Fictional availability guidance mixes online and store channels. Assigned INCORRECT / ASSESSABLE_OMISSION_OR_CONTEXT_ERROR; not an actual expert finding.

Only a fictional source description exists, with no usable URL or approved document. Obtain the dated applicable source and exact paragraph/field before a real condition correction.

run: SAMPLE-RET-R-030 | claim: SAMPLE-RET-C-030 | source: SAMPLE-RET-S-001

Implement this change

Replace one availability paragraph with three labelled facts: online stock, selected-store availability and pickup eligibility. Tie each to the same product/variant and a channel/location snapshot. Never inherit online status into a store answer.

Target question - proposed, NOT RUN

Which store should I consider for this product, and how can I verify local availability separately from online stock?

Persona: Shopper deciding between an online order and a store visit | Intent: Unbranded suitability/selection recommendation

Sample FAQ: Does online availability mean the item is in my local store?

Treat online and store availability as separate facts. Check the exact product variant and selected store, and wait for the relevant pickup or order confirmation before relying on a collection plan.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Online delivery, store availability and pickup are labelled separately for the selected location and snapshot.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 4, urgency 4, reach 4, evidence confidence 3, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Retail / RET-02

RET-02 / P2 / SCORE 56.3/100

Give pickup answers an accountable store/service source

Owner: Store operations owner + content owner + evidence reviewer | Effort: 2-3 person-days | Target: day 60

Evidence and source gap

5 claims in this sector are assigned UNVERIFIABLE with blank Source_ID. These examples show missing evidence, not a proven false condition.

Referenced claims have no source link. Catalogue targets indicate the approved material required, but are not sources cited by those claims and contain no real facts.

run: SAMPLE-RET-R-036, SAMPLE-RET-R-037 | claim: SAMPLE-RET-C-036, SAMPLE-RET-C-037 | missing_source_claim: SAMPLE-RET-C-036, SAMPLE-RET-C-037 | catalogue_target_source: SAMPLE-RET-S-002

Implement this change

Create a pickup-service answer block identifying selected store, product/channel applicability, confirmation step and source review date. Use the approved pickup source as a target. The source-missing sample claims cannot establish collection promises.

Target question - proposed, NOT RUN

How can I verify whether a nearby store offers pickup for the exact product I want?

Persona: Shopper comparing delivery and collection | Intent: Condition/source verification

Sample FAQ: Can I collect this item at a nearby branch?

Check whether the selected store's current service page confirms pickup for the chosen product. Review the location and collection information in the order confirmation; do not assume every branch supports the same service.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Reclassify every linked unknown claim against the approved source as correct, incorrect or still unverifiable; retain the locator and unresolved status.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 4, urgency 3, reach 3, evidence confidence 2, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Retail / RET-03

RET-03 / P3 / SCORE 40.0/100

Create a store-hours FAQ and replay local-source checks

Owner: Local/store-data owner + AEO analyst | Effort: 3-5 person-days | Target: day 90

Evidence and source gap

Only 22/115 valid synthetic answers display a defined-source citation. SAMPLE-RET-S-002, SAMPLE-RET-S-003 are catalogue-only. Example runs have no defined-source citation; no specific real topic gap is proven.

Original question/persona is absent. Unused catalogue descriptions contain no process facts. Obtain the approved topic source and define a separate extension question panel before testing.

run: SAMPLE-RET-R-023, SAMPLE-RET-R-024 | catalogue_target_source: SAMPLE-RET-S-003

Implement this change

Add a location FAQ separating normal hours, exception dates and the official store link. Extend a separate NOT_RUN panel with location/date questions. Count a location source as used only when its displayed citation is captured.

Target question - proposed, NOT RUN
Where can I find the official opening hours for the chosen store on a specific date?
Persona: Local shopper planning a visit | Intent: Process/navigation monitoring; proposed extension

Sample FAQ: Where can I check a store’s opening hours?

Use the official page for the selected location and date. Normal opening hours may differ on holidays or special dates, so check the current location notice before planning a visit.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Map the proposed journey/process source and capture the proposed question in a separately labelled extension panel before comparing it with the baseline.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 3, urgency 2, reach 3, evidence confidence 2, effort 3

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Ecommerce / ECOM-01

ECOM-01 / P1 / SCORE 71.3/100

Attach specifications to the selected variant and SKU

Owner: Product information/catalogue owner + ecommerce content editor | Effort: 1-2 person-days | Target: day 30

Evidence and source gap

Fictional product guidance applies one variant's attributes to another. Assigned INCORRECT / ASSESSABLE_OMISSION_OR_CONTEXT_ERROR; not an actual expert finding.

Only a fictional source description exists, with no usable URL or approved document. Obtain the dated applicable source and exact paragraph/field before a real condition correction.

run: SAMPLE-ECOM-R-037 | claim: SAMPLE-ECOM-C-037 | source: SAMPLE-ECOM-S-001

Implement this change

Replace inherited parent-product claims with a variant-specific specification block. Display the selected variant/SKU beside source-backed attributes. Prevent sibling-variant text from filling missing specifications.

Target question - proposed, NOT RUN

Which version of this product should I compare, and how can I verify the specifications for the exact variant?

Persona: Shopper comparing product variants | Intent: Unbranded suitability/selection recommendation

Sample FAQ: Does every variant have the same specifications?

Specifications belong to the exact model, variant and SKU. Match the merchant's offer with the corresponding product information, and verify that variant rather than relying on a sibling product description.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- The selected variant/SKU keeps its own attributes and compatibility; no sibling-variant facts leak into the answer.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 4, urgency 4, reach 4, evidence confidence 3, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Ecommerce / ECOM-02

ECOM-02 / P2 / SCORE 56.3/100

Source delivery and returns copy from the current offer

Owner: Merchant operations owner + ecommerce product/content reviewer | Effort: 2-3 person-days | Target: day 60

Evidence and source gap

4 claims in this sector are assigned UNVERIFIABLE with blank Source_ID. These examples show missing evidence, not a proven false condition.

Referenced claims have no source link. Catalogue targets indicate the approved material required, but are not sources cited by those claims and contain no real facts.

run: SAMPLE-ECOM-R-045, SAMPLE-ECOM-R-046 | claim: SAMPLE-ECOM-C-045, SAMPLE-ECOM-C-046 | missing_source_claim: SAMPLE-ECOM-C-045, SAMPLE-ECOM-C-046 | catalogue_target_source: SAMPLE-ECOM-S-002, SAMPLE-ECOM-S-003

Implement this change

Add merchant-specific delivery and returns facts with approved source locators, review date and selected-offer context. Keep generic unverified claims out of offer copy. Do not fill a missing deadline or condition from memory.

Target question - proposed, NOT RUN
How do I verify delivery and returns information for the exact merchant offer I am considering?
Persona: Shopper validating the offer before checkout | Intent: Condition/source verification

Sample FAQ: Where should I check delivery costs and returns conditions?

Review the current merchant offer and its linked delivery and returns information before purchase. Details may depend on the product, destination and applicable offer; ask the merchant to resolve anything the approved pages do not explain.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Reclassify every linked unknown claim against the approved source as correct, incorrect or still unverifiable; retain the locator and unresolved status.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 4, urgency 3, reach 3, evidence confidence 2, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Ecommerce / ECOM-03

ECOM-03 / P3 / SCORE 40.0/100

Add offer freshness checks to a matched monitoring panel

Owner: Ecommerce data/catalogue owner + AEO analyst | Effort: 3-5 person-days | Target: day 90

Evidence and source gap

Only 25/117 valid synthetic answers display a defined-source citation. SAMPLE-ECOM-S-002, SAMPLE-ECOM-S-003 are catalogue-only. Example runs have no defined-source citation; no specific real topic gap is proven.

Original question/persona is absent. Unused catalogue descriptions contain no process facts. Obtain the approved topic source and define a separate extension question panel before testing.

run: SAMPLE-ECOM-R-026, SAMPLE-ECOM-R-027 | catalogue_target_source: SAMPLE-ECOM-S-002, SAMPLE-ECOM-S-003

Implement this change

Create a source-date/availability FAQ and NOT_RUN questions separating stable attributes from changing offer, stock and delivery facts. Record merchant source/version and evaluation time for each assessed offer statement. No trend can be claimed from this one snapshot.

Target question - proposed, NOT RUN

How can I verify that a recommended product variant is currently available from the selected merchant?

Persona: Shopper moving from discovery to an offer | Intent: Process/navigation monitoring; proposed extension

Sample FAQ: Is a recommended product available in my chosen variant?

Select the exact variant and check availability in the current merchant offer. A source-backed description should identify the variant and when changing offer information was checked. A recommendation does not reserve an item.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Map the proposed journey/process source and capture the proposed question in a separately labelled extension panel before comparing it with the baseline.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 3, urgency 2, reach 3, evidence confidence 2, effort 3

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Banking / BANK-01

BANK-01 / P0 / SCORE 85.0/100

Place eligibility beside account suitability guidance

Owner: Banking product owner + compliance reviewer + content editor | Effort: 1-2 person-days | Target: day 7

Evidence and source gap

Fictional account guidance omits eligibility context. Assigned INCORRECT / ASSESSABLE_OMISSION_OR_CONTEXT_ERROR; not an actual expert finding.

Only a fictional source description exists, with no usable URL or approved document. Obtain the dated applicable source and exact paragraph/field before a real condition correction.

run: SAMPLE-R-035 | claim: SAMPLE-C-035 | source: SAMPLE-S-001

Implement this change

Add an eligibility answer block beside the account summary, naming the current product/version and exact approved eligibility section. Remove universal suitability wording. An accountable banking reviewer must approve applicable-condition copy before release.

Target question - proposed, NOT RUN

Which account options should I compare, and where can I verify their eligibility conditions before applying?

Persona: Customer comparing accounts before applying | Intent: Unbranded suitability/selection recommendation

Sample FAQ: Can anyone open this account?

Eligibility depends on the current account conditions and application checks. Review the provider's approved eligibility information for the selected product and ask the provider to confirm how it applies to your circumstances.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Eligibility appears next to suitability guidance for the selected account/version. Universal suitability wording is removed.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 5, urgency 5, reach 4, evidence confidence 3, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Banking / BANK-02

BANK-02 / P2 / SCORE 56.3/100

Replace unverified account statements with sourced facts

Owner: Banking product/content owner + evidence reviewer | Effort: 2-3 person-days | Target: day 60

Evidence and source gap

5 claims in this sector are assigned UNVERIFIABLE with blank Source_ID. These examples show missing evidence, not a proven false condition.

Referenced claims have no source link. Catalogue targets indicate the approved material required, but are not sources cited by those claims and contain no real facts.

run: SAMPLE-R-041, SAMPLE-R-042 | claim: SAMPLE-C-041, SAMPLE-C-042 | missing_source_claim: SAMPLE-C-041, SAMPLE-C-042 | catalogue_target_source: SAMPLE-S-001

Implement this change

Create an account fact box with product/version, approved conditions and fee-schedule links, reviewer and review date. Keep source-missing statements unresolved. Publish only facts the product reviewer can trace to current approved documents.

Target question - proposed, NOT RUN

Where can I verify the full conditions for an account described in an AI answer?

Persona: Customer checking information before an account application | Intent: Condition/source verification

Sample FAQ: Does a short account description include every condition and fee?

A summary cannot replace the current account conditions and fee schedule. Review the provider's official documents for the selected product and confirm unclear points before deciding whether to apply.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Reclassify every linked unknown claim against the approved source as correct, incorrect or still unverifiable; retain the locator and unresolved status.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 4, urgency 3, reach 3, evidence confidence 2, effort 2

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

06 / SECTOR IMPLEMENTATION

Banking / BANK-03

BANK-03 / P3 / SCORE 40.0/100

Add process questions with source-specific capture

Owner: Banking journey/content owner + AEO analyst | Effort: 3-5 person-days | Target: day 90

Evidence and source gap

Only 18/116 valid synthetic answers display a defined-source citation. SAMPLE-S-002, SAMPLE-S-003 are catalogue-only. Example runs have no defined-source citation; no specific real topic gap is proven.

Original question/persona is absent. Unused catalogue descriptions contain no process facts. Obtain the approved topic source and define a separate extension question panel before testing.

run: SAMPLE-R-019, SAMPLE-R-020 | catalogue_target_source: SAMPLE-S-002, SAMPLE-S-003

Implement this change

Build a source-linked enquiry-process FAQ and add NOT_RUN mortgage/business-product process questions to a separate extension panel. Retain displayed citations and approved process versions in a matched follow-up. Report failed captures separately and do not infer uplift.

Target question - proposed, NOT RUN
Where can I check the official next steps after a mortgage enquiry?
Persona: Customer seeking the next step after product discovery | Intent: Process/navigation monitoring; proposed extension

Sample FAQ: What happens after a mortgage enquiry?

Use the provider's current process page to understand the enquiry and application steps. Document requests, assessment and decisions depend on the applicable process and circumstances; ask the provider to confirm the next step and timing.

Acceptance checks

- Every factual condition/attribute in revised copy has a dated accountable owner-approved source and exact locator; no synthetic record is used as real proof.
- Map the proposed journey/process source and capture the proposed question in a separately labelled extension panel before comparing it with the baseline.
- Apply the shared reviewer, capture and matched-follow-up gates on the delivery-plan page.

Ratings (1-5): impact 3, urgency 2, reach 3, evidence confidence 2, effort 3

Dependencies: Approved actual source and permission to use it; Named accountable product/content reviewer; Defined baseline and separately labelled extension panel before real measurement

07 / DELIVERY AND MONITORING

The 30 / 60 / 90-day plan

Turn the ranked backlog into a controlled sequence. Re-measure only after approved changes; compare equivalent conditions and keep a change log.

DAYS 01-30

Establish facts and release the first fixes

Confirm source versions and owners. Review P0 sample scenarios; draft and approve eligibility/exclusion answers. Deliver the low-effort content corrections. Capture the actual baseline before release.

DAYS 31-60

Complete source-backed journeys

Publish the remaining approved product, store and variant guides. Validate crawlability, internal links and page markup. Record release dates and material offer/policy changes.

DAYS 61-90

Rerun, explain and decide

Rerun the agreed question set with repetitions under comparable surface, mode, language and locale. Inspect changed claims and source links. Report result differences, access failures and confounders, then reprioritise.

Monitoring acceptance

- A domain reviewer signs off each answer block and FAQ. Unresolved statements remain withheld or explicitly unverified.
- The prompt set, personas, language, geography, surfaces, modes and repetitions are documented and versioned.
- Every answer retains its full text, displayed citations, timestamp, completion status and applicable source version. Proposed questions stay NOT_RUN until captured.
- A release ledger records content changes, offer/policy changes and measurement-condition changes.
- Matched follow-up preserves questions, surface/mode, language and repeats; failures and denominator changes are disclosed.
- Visibility, factual accuracy, assessment coverage and business outcomes are reported independently.

08 / MEASUREMENT CONTRACT

What a live report must preserve

This sample contains no live engine identity, original prompt text, run timestamp, repeat group, competitor corpus or second measurement period. Those fields must be captured before platform, persona, trend or uplift analysis is valid.

Metric	Numerator	Denominator
Brand mention	Valid answers naming the defined sample brand	All eligible valid sample answers
Brand recommendation	Valid eligible answers recommending the defined brand	Valid recommendation-eligible answers
Defined-source citation	Valid answers displaying at least one predefined source link	All eligible valid sample answers
Checked accuracy	Claims classified correct	Claims classified correct + incorrect
Assessment coverage	Claims classified correct + incorrect	All sample claims
Run success	Valid records	All attempted records

Required comparison discipline

- Keep branded and unbranded intent groups separate; measure prompts and repeated answers at their documented levels.
- A consumer interface and a model API are distinct measurement modes. Never assume identical outputs.
- Do not average vendor visibility percentages with different denominators or merge surface scores without stated weighting.
- Preserve all failures and unknown claims. A citation alone does not establish source correctness or relevance.
- Only show uncertainty intervals for a real sampling design with supported assumptions; none are claimed for this synthetic dataset.

Confidence and sentiment

The action-rating confidence is an ordinal planning input. It is separate from statistical uncertainty. The source data does not support a sentiment or recommendation-position score, so neither is invented.

09 / EVIDENCE AND REPORT PRACTICE

Inspectable evidence, reusable methods

A robust live report connects each finding to an exact answer, prompt, displayed URL, source version, reviewer decision and implementation ticket.

Sample evidence chain

Sample run ID -> sample claim ID -> source ID -> assessment -> action ID -> approved change -> comparable follow-up. The accompanying data package preserves these joins. The sources are fictional records with no public URLs.

The report practices incorporated

Practice	Applied in this sample
Executive focus	Start with decisions and urgent fixes, then offer inspectable drill-down evidence.
Explicit measurement	Separate presence, recommendations and citations; retain each eligible denominator.
Actionability	Use source-linked content tasks, owners, score components, effort estimates and acceptance checks.
Source audit	Show missing, incorrect and unverifiable evidence; preserve the approved source version.
Monitoring discipline	Use a versioned question set, equivalent conditions, repetitions and release/change logs.

Selected official references

Profound: About Answer Engine Insights (AEI)
https://help.tryprofound.com/articles/3443229936-answer-engine-insights-overview

Conductor: AI Search Performance
https://www.conductor.com/platform/features/ai-search-performance/

Semrush Enterprise AIO: AI Visibility Platform
https://enterprise.semrush.com/discover-enterprise/ai-visibility-platform/

Peec AI: Visibility metric
https://docs.peec.ai/metrics/brand-metrics/visibility

Scrunch: Metrics Reference - Explorer Names and API Fields
https://helpcenter.scrunchai.com/en/articles/16823372-scrunch-metrics-reference-explorer-names-and-api-fields

Sources reviewed on 14 October 2026. Practices are adapted to the assignment; this report is not certified by or affiliated with the named platforms.

Supporting sample data and this report:
holisticrm.com/aeo-geo-report-example/