AI Search Checklist: 92 Steps to Get Your Business Cited by ChatGPT and Google AI Overviews

92 steps in five groups.

By Alex Wolk, founder of Insite Advice · Last reviewed: November 19, 2026
Interactive version: https://insiteadvice.com/ai-search-checklist/

Check each box as you finish a step. Work through the parts in order, or start with the gaps that matter most for your business.

Part 1 — Clear answers (steps 1–24)

Clear answers in steps 1–24 of the INSITE ADVICE checklist start with a direct response, question-shaped headings and sections that make sense on their own. Name the subject explicitly, keep sentences and paragraphs short, and choose the format that fits the question: a definition, numbered process, comparison table or recommendation.

Say it plainly

- [ ] 1 **Answer first, background second.** Put the direct answer in the opening 100–150 words of the page. Opening passages are often the part AI tools lift, so put the answer before the backstory.
- [ ] 2 **Write headings as questions.** Phrase H2s the way customers phrase prompts — "How much does a roof replacement cost in St. Louis?" is a closer match for real prompts than a heading that just says "Pricing."
- [ ] 3 **Let every section stand alone.** AI tools tend to quote passages, not whole pages. A section should still make complete sense when it is lifted out by itself, with no "as we said earlier" holding it up.
- [ ] 4 **Add a key-points box near the top.** Three to five bullets that sum up the page hand the engine a ready-made summary to quote.
- [ ] 5 **Define the topic in one clean sentence.** A plain "X is…" sentence early on. A clean definition is one of the easiest passages for an AI tool to quote.
- [ ] 6 **End with a verdict.** Close the page, and its main sections, with an actual recommendation. A page that hedges on everything gives the model nothing it can repeat.
- [ ] 7 **Name who the page is for.** Say it in the introduction — "for St. Louis homeowners comparing HVAC companies" — so both readers and engines know the audience.

Write it plainly

- [ ] 8 **Keep sentences short.** One idea per sentence, roughly 20 words or fewer. Long, tangled sentences are more likely to be paraphrased than quoted.
- [ ] 9 **Keep paragraphs short.** Two to four sentences each. Dense walls of text are hard for people to read and hard for parsers to split into quotable chunks.

- [ ] 10 **Use simple, direct statements.** Subject, verb, object: "Schema markup tells search engines what a page is about" is quotable. "There are many benefits to schema" is not.
- [ ] 11 **Name names.** Use the actual brand, product, person, place and concept instead of vague references. "INSITE ADVICE checks ChatGPT, Perplexity, Claude, Gemini and Google" beats "we check the major AI tools."
- [ ] 12 **Use real numbers, dates and ranges.** "$1,500–$3,500 a month" and "within 30 days" can be quoted. "Affordable" and "fast" cannot.
- [ ] 13 **Cut empty superlatives.** "Best in the industry" reads as advertising and is easy to skip. Support the claim with a fact, or delete the claim.

Format it for quoting

- [ ] 14 **Build every section to be quoted on its own.** Give each H2 the same anatomy: a question heading; a one- or two-sentence direct answer (roughly 40–60 words) that names the subject instead of saying "it"; one specific, checkable fact — a number, date, price or named example, with its source; then the supporting detail, steps or table. If that opening answer were the only text an AI tool lifted, it should still be accurate and complete.
- [ ] 15 **Use a real comparison table.** For "versus" and "best" questions, a table is often the most useful block on the page. Build it as an actual HTML table, never as an image of one.
- [ ] 16 **Use bulleted and numbered lists.** Many AI answers are formatted as lists, so list content fits them with little rewriting.
- [ ] 17 **Add a FAQ section with 5–10 real questions.** Take the questions from Google's People Also Ask, forums, and your own sales calls and contact forms — not from a keyword tool's guesses.
- [ ] 18 **Number the steps of any process.** Step-by-step sections line up almost one-to-one with "how do I…" prompts.
- [ ] 19 **Show pros and cons.** A balanced take signals objectivity and answers comparison prompts directly.
- [ ] 20 **Include a cost or pricing section.** Even a range helps. Price is the most common follow-up question behind almost every buying search.
- [ ] 21 **Use your own images, with descriptive alt text.** Original visuals add something no other page has, and alt text is how machines read them.
- [ ] 22 **Embed a video where you have one.** Google's AI Overviews and AI Mode cite YouTube often — in Otterly.ai's citation study, forums and video made up about a quarter of their citations. A relevant video on the page works for both the page and the video channel.
- [ ] 23 **Give one clear call to action.** Visitors who arrive from AI answers are fewer but warmer. Give them one obvious next step, matched to what the page is about.
- [ ] 24 **Link to related pages with descriptive anchors.** Internal links with clear anchor text help engines map your pages into a topic — and your authority on it.

Part 2 — Information only you have (steps 25–45)

Original information in steps 25–45 of the INSITE ADVICE checklist means publishing evidence from your own work: data, first-hand experience, named projects, customer quotations and a documented method. Explain the relevant costs, effort, limitations and alternatives so readers can judge the evidence and decide whether your approach fits their needs.

- [ ] 25 **Publish your own data.** Numbers only you hold: your results, your benchmarks, your pricing, your counts. Original figures also get cited by other websites, which compounds.
- [ ] 26 **Run a small survey or study.** Even 50 responses from inside your niche can turn your page into the source everyone else points to.
- [ ] 27 **Show first-hand experience.** Say what you actually did: "We tested this on our own site for 60 days before offering it to clients." Specifics are the proof.
- [ ] 28 **Use real screenshots.** Your product, your process, your dashboard. Screenshots demonstrate experience in a way stock photography never will.
- [ ] 29 **Write case studies with specifics.** Named client or project, real numbers, a timeline, before and after. Vague success stories convince nobody, human or machine.
- [ ] 30 **Quote named, credentialed experts.** A person with a name and a title is citable. "Experts say" is not.
- [ ] 31 **Quote your customers' actual words.** Short excerpts from real reviews add trust and language that exists nowhere else.
- [ ] 32 **Give your method a name.** A named framework or process is easier for AI tools to repeat along with the name of whoever created it. If you have a way of working, name it and publish it.
- [ ] 33 **Take a position the consensus doesn't.** A different take, backed by evidence, stands out in a field of pages that all repeat each other.
- [ ] 34 **Publish a free tool, template or checklist.** A genuinely useful standalone resource keeps earning links and citations for years. This page is our example.
- [ ] 35 **Cover the basics around the topic.** What it is, how it works, the main types. A first-time buyer needs that context before any decision makes sense.
- [ ] 36 **Cover cost and budget properly.** The range, what pushes the price up or down, and the fees people get surprised by.
- [ ] 37 **Cover timeline and effort.** How long it takes, what getting started looks like, and what the customer has to do on their end.
- [ ] 38 **Cover risks, limits and common mistakes.** Pages that admit the downsides read as balanced, which makes them safer for readers and engines to rely on.
- [ ] 39 **Say who should NOT buy it.** Naming who a service is wrong for builds trust and answers the "is this worth it for me?" prompt.
- [ ] 40 **Name the alternatives.** Competitors, substitutes and different approaches — doing it yourself, hiring in-house, buying software, hiring an agency. Pages that pretend there are no alternatives are less useful for comparison questions.

- [ ] 41 **Segment by "best for."** Explain how the right answer changes with budget, size, location, urgency or goal. One-size-fits-all advice fits nobody.
- [ ] 42 **Explain how to choose.** The questions to ask any provider before buying, including you. A short decision framework answers the follow-up question before it gets asked.
- [ ] 43 **Explain what happens next.** Walk through what follows after someone signs, books or buys, so there are no surprises.
- [ ] 44 **Link onward to deeper resources.** Point the reader to the next page they will need, so they don't have to run a second search to continue.
- [ ] 45 **Add location detail where it's relevant.** City and neighborhood specifics match the way people prompt for local services — and local is where most small businesses win or lose.

Part 3 — Trust signals (steps 46–58)

Trust signals in the INSITE ADVICE checklist connect advice to an identifiable author and visible evidence. This page names Alex Wolk, founder of Insite Advice, and displays “Last reviewed: November 19, 2026.” Steps 46–58 cover author information, sources, methodology, limitations and substantive updates—not simply changing a date.

- [ ] 46 **Put a real author's name on it.** A named person with a bio and a photo. "Editorial team" bylines give readers and engines little to verify.
- [ ] 47 **Give the author a real author page.** Credentials, experience, and links to their profiles — LinkedIn, publications, talks, directories.
- [ ] 48 **Add a reviewer line on high-stakes topics.** For legal, medical or financial content: "Reviewed by [Name], [credential]." It shows readers and engines that a qualified person checked the page.
- [ ] 49 **Cite your sources and link them.** Primary documents, official data, studies. Outbound citations show the homework behind the claims.
- [ ] 50 **Publish your methodology.** On comparison and ranking pages, explain how you chose, tested or scored. It is a strong trust signal for readers of any "best" page.
- [ ] 51 **State your limitations.** What you didn't test, what might not apply, what you're unsure of. Candor reads as honesty and makes the rest of the page more quotable.
- [ ] 52 **Make your About page factual.** Founding year, location, team size, services, notable clients. Facts, not slogans.
- [ ] 53 **Attach sources to your social proof.** Reviews, awards and client names with dates and links. A claim with a source is more credible than a bare claim.
- [ ] 54 **Show a "last updated" date on the page.** And make it match the dateModified value in your schema, so the visible date and the machine-readable date agree.
- [ ] 55 **Actually update key pages every 30–90 days.** Refresh the data, the examples, the screenshots. Changing only the date, with nothing behind it, can backfire.
- [ ] 56 **Date your facts in the text.** "2026 pricing." "As of November 2026." It tells the engine the information is current without making the reader guess.

- [ ] 57 **Add a short "what changed" note when you update.** A line or two of change history proves the update was real work, not a date bump.

- [ ] 58 **Keep prices, features and rankings current.** Stale facts are an easy way to lose a citation you already had.

Part 4 — Pages machines can read (steps 59–78)

Technical checks in steps 59–78 of the INSITE ADVICE checklist start with crawler access, readable HTML and search indexing. Check whether important text depends on JavaScript, whether Bing and Google index the page, and whether snippet restrictions block its use. Keep headings, lists and business details clear and consistent.

- [ ] 59 **Let the AI crawlers in.** Your robots.txt should allow the crawlers AI search runs on — OAI-SearchBot and ChatGPT-User (ChatGPT), PerplexityBot, Claude's search crawlers, and Googlebot. Note: Google-Extended controls training for Gemini, not whether you appear in AI Overviews.

- [ ] 60 **Know which AI crawler does what before you edit robots.txt.** Search crawlers decide whether you can be cited. Training crawlers decide whether your content can be used to train models. Each one is a separate user agent, so you can allow search and block training. For example, you can allow OAI-SearchBot to appear in ChatGPT search while blocking GPTBot, and OpenAI treats the two settings independently. Also check that your CDN or firewall isn't blocking the bots you allow in robots.txt.

  Sources: OpenAI crawlers · Anthropic crawlers · Perplexity crawlers · Google Search Central (checked November 2026)

- [ ] 61 **Serve your content in plain HTML.** Many AI crawlers do not run JavaScript. If your text only appears after scripts load, they may see an empty page. Server-rendered or static pages don't have this problem.

- [ ] 62 **Check what crawlers actually receive.** Test it rather than assuming. Open `view-source:` for the page, not the Inspect panel (which shows the page after scripts run), and search for a sentence from your main content. Fetch the page with `curl -A "OAI-SearchBot" https://yoursite.com/page/` and confirm the text is in the response. Reload with JavaScript disabled in your browser's developer tools. In Google Search Console, use URL Inspection, then View crawled page, then HTML, to see what Googlebot got. If headings, answers, prices or FAQs are missing from any of these, fix the rendering first.

- [ ] 63 **Get indexed in Bing.** Submit the site in Bing Webmaster Tools and push new and updated URLs with IndexNow. Bing's index feeds Copilot and is widely reported as a source for ChatGPT search — and many sites never bother.

- [ ] 64 **Get indexed in Google.** Google says AI Overviews and AI Mode only show pages as supporting links if they are indexed and eligible to show a snippet. Confirm your key pages in Search Console.

- [ ] 65 **Meet Google's requirements for AI Overviews and AI Mode, and skip the myths.** Google says there are no extra technical requirements: to be shown as a supporting link, a page must be indexed and eligible to appear in Search with a snippet. The SEO fundamentals Google lists for its AI features are:

  No special schema.org markup, AI text file or new machine-readable file is required. AI feature clicks are counted in Search Console's Performance report under the "Web" search type. Source: Google Search Central: AI features and your website

- [ ] 66 **Cover Perplexity and Claude, not just ChatGPT and Google.** Perplexity builds its search results with PerplexityBot, so allow it in robots.txt and allow its published IP ranges in your firewall. Claude's search relies on Claude-SearchBot and Claude-User, and Anthropic lists Brave Search as a web search subprocessor. Brave's crawler won't crawl pages that are closed to Googlebot, so your Googlebot rules affect Claude too. Then run your prompt list (step 87) in both engines and note which sources each one cites.
  Sources: Perplexity crawlers · Anthropic crawlers · Anthropic subprocessors · Brave Search crawler
- [ ] 67 **Don't block your own snippets.** Avoid nosnippet tags and tight max-snippet limits on pages you want cited — Google uses those controls to decide what its AI features may show.
- [ ] 68 **Be fast and mobile-friendly.** Slow pages time out for crawlers and lose the readers who do click through.
- [ ] 69 **Keep an XML sitemap with honest lastmod dates.** Accurate modification dates help engines find and re-crawl fresh content quickly.
- [ ] 70 **Use semantic HTML and a clean heading order.** One H1, H2s and H3s in logical order, and real table and list elements instead of styled divs pretending to be them.
- [ ] 71 **Add an llms.txt file — last, and optionally.** It's cheap to publish, but no major engine has confirmed using it, and Google says you don't need AI text files for AI Overviews or AI Mode. Do everything else on this list first.
- [ ] 72 **Add Organization or LocalBusiness schema with sameAs links.** Connect your website entity to your Google Business Profile, LinkedIn, directory listings and social profiles, so engines can confirm it's all one business.
- [ ] 73 **Add Person schema for your authors.** Name, job title, credentials and profile links — the machine-readable version of steps 46–47.
- [ ] 74 **Add Article schema with both dates.** datePublished and dateModified make your freshness readable to machines, not just to people.
- [ ] 75 **Match FAQPage schema to the visible FAQs exactly.** Same questions, same answers, word for word. Google's guidance is that structured data should match the visible text, so schema describing content the page doesn't show can do more harm than good.
- [ ] 76 **Use one entity statement everywhere.** A single sentence that describes your business, repeated word for word on your site, your LinkedIn page and your directory profiles.
- [ ] 77 **Keep name, address and phone identical everywhere.** Mismatched details across listings make entity matching harder and citations less likely.
- [ ] 78 **Complete your Google Business Profile.** Right categories, every service listed, current photos, posts, and a steady flow of reviews. Google advises keeping Business Profile information up to date for its AI features, and local AI answers often draw on it.

Part 5 — Distribution and measurement (steps 79–92)

AI search measurement in steps 79–92 of the INSITE ADVICE checklist separates source citations, mentions in answer text and referral visits. Check the same customer prompts monthly across the named engines, count citations and

mentions separately, and use GA4 to track visits. Prioritize refreshing pages that have lost citations.

- [ ] 79 **Get listed on the directories AI actually cites.** Run your most important prompts, note which directories show up in the answers, and claim and complete those profiles first.
- [ ] 80 **Get into other people's "best of" lists.** In Otterly.ai's 617,985-citation study, list-style pages were the most-cited page type in its sample. Being included in independent roundups is worth real outreach effort.
- [ ] 81 **Publish your own honest roundups.** Fair "best of" and comparison pages that include competitors, with your selection criteria stated. They earn citations of their own — and readers can tell the difference between a ranking and an ad.
- [ ] 82 **Show up on Reddit and Quora as a person, not a promoter.** Answer questions usefully, disclose who you are, and don't pitch. Reddit was a main source for Google's AI features in Otterly.ai's study.
- [ ] 83 **Make a YouTube video for each key topic.** Google's AI features cite YouTube often. Put the full transcript and chapter timestamps in the description.
- [ ] 84 **Publish on LinkedIn under named people.** Articles and posts from your founder and specialists can show up in AI answers. Keep the profiles factual and specific.
- [ ] 85 **Earn coverage: PR, guest posts, podcasts.** Mentions in trade publications and other people's content build third-party trust that can help when AI engines decide who to name.
- [ ] 86 **Keep reviews coming in.** A steady flow of recent reviews on Google and on your industry's platforms supports your visibility in local AI answers.
- [ ] 87 **Build your prompt list.** Write down 20–50 real questions a customer would ask an AI tool before hiring a business like yours. Every measurement below runs off this list.
- [ ] 88 **Check those prompts monthly, on every major engine.** ChatGPT, Perplexity, Google AI Overviews and AI Mode, Gemini, Claude and Copilot. Same prompts, same way, every month.
- [ ] 89 **Track citations and mentions separately.** Being linked as a source and being named in the answer text are two different wins. Count both.
- [ ] 90 **Measure SEO and GEO separately.** They answer different questions, so report them side by side instead of blending them into one number. A page can rank well and never get cited, or get cited without ranking first.
- [ ] 91 **Set up an AI referral segment in GA4.** Filter sessions from chatgpt.com, perplexity.ai, gemini.google.com, copilot.microsoft.com and claude.ai so you can see whether AI visibility is turning into visits.
- [ ] 92 **Refresh the pages that are losing citations first.** A page that was cited and slipped is usually faster to fix than a new page is to rank. Start every update cycle there.

Want help with the steps you haven't checked yet?
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Interactive checklist with saved progress: https://insiteadvice.com/ai-search-checklist/