



The PlusROI AI Search Optimization Checklist

Comprehensive Assessment & Action Planning

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How to Use This Checklist: This is a working tool to assess your current AI search optimization position and plan your next steps. There are no "right answers"—the goal is understanding where you stand and prioritizing what matters most for your business.

1. **Make a copy** - File → Make a Copy to create your own editable version (or Download as a Word Doc, also under the File menu). A PDF is also available.
2. **Go through each area** - Assess your current state honestly
3. **Check the boxes** - Mark what you've completed or areas needing work
4. **Note your competitive position** - This helps prioritize effort
5. **Identify your quick wins** - What can you tackle in 30 days?
6. **Build your 90-day roadmap** - Use the final section to plan

Notes:

- Not all areas will be relevant to all businesses or websites.
- If you need help, we're here for you. We offer a range of services from Strategy & Prioritization through to "Done for You" services.

AREA I: Authority & Expertise Signals

Why this matters: AI systems determine if you're actually authoritative before citing you. This is foundational.

Foundational Items

Add/update author bios on key pages

- Include specific credentials, years of experience, relevant qualifications
- Link to LinkedIn or professional profiles
- Show what makes this person an expert on THIS topic

Update your About page with specificity

- Current state: Is it generic or does it demonstrate real expertise?
- Include team credentials, relevant experience, proven track record
- Show what clients/customers say about your expertise

Create/update founder/leader bios with credentials

- If you're the expert, make your credentials visible
- Include professional background, certifications, notable achievements
- Link to social proof (media mentions, speaking engagements, etc.)

Ensure NAP consistency (if local business)

- Verify Name, Address, Phone are consistent across your site
- Check Google Business Profile, directories match
- Consistency is an authority signal

Strategic Initiatives to Consider

Build expert positioning across your team

- Create individual team member profiles/bios on site
- Highlight specialized expertise (who handles what?)
- Encourage team members to build LinkedIn presence
- Add team credentials to relevant content pieces

Develop credentials/certifications visibility

- Audit and prominently display relevant credentials
- Link to certifying bodies when possible

- Show industry affiliations and memberships
- Create a "credentials" or "qualifications" page if appropriate

Build editorial standards/review process visibility

- Show your fact-checking process
- Display editorial standards
- Link to sources and citations used
- If relevant: show peer review or expert editing

Current State Assessment

Author Credentials & Bios: Current: ☐ Minimal/Missing ☐ Partial ☐ Present ☐ Comprehensive & Specific

About Page Quality: Current: ☐ Generic/Thin ☐ Adequate ☐ Good ☐ Exemplary - shows real expertise

Team/Expert Positioning: Current: ☐ Not visible ☐ Partially visible ☐ Well-organized ☐ Integrated throughout site

E-E-A-T Signals Present: Current: ☐ Weak ☐ Moderate ☐ Strong ☐ Excellent

Competitive Positioning

☐ We are AHEAD of competitors in authority positioning ☐ We are ALIGNED with competitor authority positioning ☐ We are BEHIND competitors - need to build credibility positioning

Implementation Notes

What authority signals are your biggest gaps? What's your competitive advantage?

AREA 2: Content Comprehensiveness & Structure

Why this matters: AI systems need to understand your content's logical structure and completeness to extract and cite it.

Key Items to Address

Audit H1/H2/H3 hierarchy on 5-10 key pages

- Do your most important pages have clear heading structure?
- One H1 per page (main topic)
- Logical H2 subheadings
- H3s breaking down subsections
- Reformat if needed

Add table of contents with jump links to long-form content

- Identify your 3-5 longest, most important pages
- Add clickable TOC at top
- Link to H2 headings
- Improves both scannability and extractability

Review opening paragraphs for answer clarity

- Does the first paragraph answer the main question?
- Or is the answer buried in paragraph 4-5?
- Reorganize so direct answers appear early
- Apply to 5-10 priority pages

Add subheadings to dense, long paragraphs

- Identify wall-of-text paragraphs
- Break into logical sections with subheadings
- Improves both human readability and AI extractability

Strategic Initiatives to Consider

Conduct content comprehensiveness audit vs. competitors

- Identify your top 3 competitors
- For your most important pages, compare:
 - Word count vs. competitors
 - Topics covered vs. competitors
 - Depth of explanation

- Supporting examples/data
- Identify gaps you should fill

Rewrite content to be more comprehensive on priority topics

- Start with top-priority pages (most traffic/important)
- Add missing topics/subtopics vs. competitors
- Include more specific examples and context
- Increase depth while maintaining clarity

Create jump-link navigation between related content

- Map your content clusters & consider your Pillar Strategy.
- Add "related reading" or "jump to section" links
- Help readers/AI systems navigate your full expertise

Current State Assessment

Heading Structure (H1/H2/H3): Current: ☐ Inconsistent/Missing ☐ Partial ☐ Organized ☐ Consistently clear

Content Hierarchy & Organization: Current: ☐ Unclear ☐ Somewhat organized ☐ Well-structured ☐ Exemplary flow

Scannable Formatting: Current: ☐ Dense text ☐ Some formatting ☐ Generally scannable ☐ Highly scannable

Answer Clarity: Current: ☐ Buried in content ☐ Eventually clear ☐ Clear in opening ☐ Direct & immediate

Content Depth vs. Competitors: Current: ☐ Significantly shorter ☐ Similar length ☐ Slightly more comprehensive ☐ Notably more detailed

Competitive Positioning

☐ We cover MORE comprehensively than competitors ☐ We cover SIMILAR breadth as competitors ☐ We cover LESS comprehensively - need to expand

Implementation Notes

Where are your content structure weaknesses? Which pages need the most restructuring?

AREA 3: Structured Data Implementation (Schema)

Why this matters: Schema markup tells AI systems exactly what information is on your page and how to interpret it.

Key Items to Address

Audit current schema implementation

- Run site through schema validator (schema.org)
- Identify what schema you currently have
- Note any errors or warnings
- Document missing opportunities

Implement FAQ schema on service/product pages

- Identify pages that answer customer questions
- Create 8-10 Q&As per page (FAQ schema format)
- Start with highest-priority pages
- Test implementation

Recommended pages: [list your top service/product pages]

Implement Organization schema

- Add schema to your homepage
- Include: business name, logo, contact info, social profiles
- Helps AI understand who you are

Fix any schema errors from validator

- Address validation warnings
- Ensure no data is malformed
- Re-test

Strategic Initiatives to Consider

Implement Article schema on blog/thought leadership content

- Mark up your published articles/posts
- Include: headline, date published, author, excerpt
- Helps AI understand these are authoritative content

Implement HowTo schema for process/guide content

- Identify pages that explain a process step-by-step
- Create HowTo schema
- Improves extraction and understandability

Implement LocalBusiness schema

- If you serve specific locations/territories
- Include: service areas, hours, contact
- Multiple location pages if applicable

Create schema for case studies/testimonials

- If you have success stories
- Schema helps AI recognize these as social proof
- Include: company/person name, results, testimonial

Implement breadcrumb schema site-wide

- Helps AI understand site structure
- Shows hierarchical relationships

Current State Assessment

Schema Markup Present: Current: ☐ None/Minimal ☐ Basic (Organization only) ☐ Multiple types ☐ Comprehensive

FAQ Schema Implementation: Current: ☐ Not implemented ☐ On some pages ☐ Most service pages ☐ Complete coverage

Article/Content Schema: Current: ☐ Not implemented ☐ Partial ☐ Most pages ☐ Consistent across site

Schema Validation Status: Current: ☐ Errors present ☐ Warnings present ☐ Minor issues ☐ Clean validation

Competitive Positioning

☐ We implement MORE schema than competitors ☐ We implement SIMILAR schema as competitors ☐ We implement LESS schema - need to catch up

Implementation Notes

Which schema types matter most for your business? What technical resources do you need?

AREA 4: Content Freshness & Maintenance

Why this matters: AI systems check if content is current. Recent, actively-maintained content is more trustworthy.

Key Items to Address

Add/verify "last updated" dates on priority content

- Identify your 10 most important pages
- Ensure they have visible publication/update dates
- Update dates if content was recently revised

Audit and update outdated statistics/data

- Review content for old statistics or references
- Update to current year/data where possible
- Add source citations for data

Create blog/resources section if missing

- If you're a service business without a blog, consider one
- Or create a "resources" or "insights" section
- Shows ongoing thought leadership

Strategic Initiatives to Consider

Establish content update schedule

- Identify which content needs regular updates
- Schedule quarterly reviews of evergreen content
- Schedule annual updates for timely content
- Assign ownership/responsibility

Create content calendar for new thought leadership

- Plan 6-12 months of new content/insights
- Identify thought leadership topics
- Schedule publication dates
- Assign creators

Implement systematic content review process

- Quarterly reviews of priority content

- Check for accuracy, relevance, freshness
- Update statistics, links, references
- Track changes in version history

Archive or consolidate outdated content

- Identify significantly outdated pages
- Either: update, consolidate with newer content, or remove
- Add 301 redirects if removing

Current State Assessment

Last Updated Dates Visible: Current: ☐ Not shown ☐ Some pages ☐ Most pages ☐ Consistently displayed

Content Update Frequency: Current: ☐ Never updated ☐ Occasionally updated ☐ Regular updates
☐ Systematic process

Evergreen vs. Timely Content Balance: Current: ☐ Mostly timely (aging) ☐ Mixed ☐ Mostly evergreen ☐ Well-balanced strategy

Blog/Resources Activity: Current: ☐ None ☐ Inactive (>6 months) ☐ Occasional ☐ Regular new content

Competitive Positioning

☐ We update content MORE frequently than competitors ☐ We update content at SIMILAR frequency as competitors ☐ We update content LESS frequently - need more activity

Implementation Notes

How often does your content actually need updating? What's your maintenance capacity?

AREA 5: Summary & Extraction Optimization

Why this matters: AI systems extract summaries and key takeaways. Making this easy increases your citation likelihood.

Key Items to Address

Add executive summary/key takeaways to long-form content

- Identify 3-5 longest/most important pages
- Add "Key Takeaways" or "Summary" section at beginning
- Make it scannable (bullet points or short paragraphs)

Optimize meta descriptions for relevance

- Ensure meta descriptions accurately reflect page content
- 150-160 characters
- Include primary keyword naturally
- Make it compelling for AI extraction

Add featured/highlighted key facts

- Use bold, color, or callout boxes for important stats
- Make key claims easy to extract
- Highlight most quotable information

Strategic Initiatives to Consider

Create TL;DR sections for all key content

- Add "Too Long; Didn't Read" summaries
- One paragraph maximum, bullet points format
- Can appear at top or bottom of content
- Helps AI systems quickly understand value

Optimize for featured snippet format

- Identify common questions AI systems ask
- Create direct answer content in featured snippet format
- Include: definition, list, or table format

Create callout/highlight boxes for key statistics

- Identify your most important data points

- Create visual highlight boxes
- Make them easy for AI systems to recognize and extract

Implement structured data for key facts/statistics

- Use schema to mark up important statistics
- Makes extraction unambiguous
- Helps AI systems cite data accurately

Current State Assessment

Opening Summaries/Key Takeaways: Current: ☐ Not present ☐ Some pages ☐ Most pages ☐ Consistent throughout

Meta Descriptions Quality: Current: ☐ Generic/thin ☐ Adequate ☐ Relevant ☐ Optimized for extraction

Key Facts/Statistics Highlighting: Current: ☐ Not highlighted ☐ Occasionally bolded ☐ Usually highlighted ☐ Systematic highlighting

Direct Answer Positioning: Current: ☐ Buried in content ☐ Eventually clear ☐ Clear early on ☐ Immediately obvious

Competitive Positioning

- ☐ Our content is EASIER to extract than competitors ☐ Our content is SIMILAR difficulty as competitors
- ☐ Our content is HARDER to extract - need improvement

Implementation Notes

What are your 3-5 most important statistics or claims that should be highlighted?

AREA 6: Internal Linking & Topic Clusters

Why this matters: AI systems understand depth by seeing related content interconnected. Internal links show expertise breadth.

Key Items to Address

Audit your site's topic structure

- Map out major topics you cover
- Identify pillar pages (main topics)
- Identify supporting/cluster content
- Document current internal linking patterns

Add "related reading" sections to priority pages

- Identify 5-10 most important pages
- Add related content links at bottom of each
- Link to 2-4 related pages
- Use descriptive anchor text (not "click here")

Link new content to existing pillar pages

- When publishing new content, link back to pillar
- Link pillar pages to new content
- Helps establish content hierarchy

Conduct internal link audit

- Use Screaming Frog or similar tool
- Identify orphan pages (no internal links)
- Identify over-linked pages
- Plan fixes

Strategic Initiatives to Consider

Build pillar page strategy

- Identify 3-5 main topics you want to own
- Create comprehensive pillar pages for each
- Design as hub pages with links to cluster content
- Each pillar links to 8-10 supporting pieces

Your pillar topics should be:

1. _____
2. _____
3. _____
4. _____
5. _____

Create topic cluster content

- For each pillar, create 8-10 supporting content pieces
- Each piece covers sub-topic or question
- All link back to pillar and to each other contextually
- Shows comprehensive expertise

Implement contextual internal linking throughout site

- Add internal links within paragraph text
- Link to related concepts/deeper dives
- Use descriptive anchor text

Create content cluster visual mapping

- Document how topics interconnect
- Show to team so linking strategy is clear
- Use this as guide for future content

Current State Assessment

Pillar Page Strategy: Current: ☐ No clear structure ☐ Some organization ☐ Identified pillars ☐ Established hub/spoke

Internal Linking: Current: ☐ Minimal ☐ Inconsistent ☐ Moderate ☐ Strategic and comprehensive

Topic Cluster Development: Current: ☐ Not organized ☐ Partial clusters ☐ Some clusters ☐ Comprehensive clusters

Anchor Text Quality: Current: ☐ Generic/unclear ☐ Sometimes descriptive ☐ Usually descriptive ☐ Consistently descriptive

Competitive Positioning

☐ Our internal linking strategy is MORE sophisticated than competitors ☐ Our strategy is SIMILAR to competitors ☐ Our strategy is LESS developed - need to catch up

Implementation Notes

What are your natural topic clusters? How does your content naturally group together?

AREA 7: Technical Foundation & Accessibility

Why this matters: AI systems won't cite content they can't properly access or crawl.

Foundational Items

Check Core Web Vitals score

- Run site through PageSpeed Insights
- Note LCP (Largest Contentful Paint), FID (First Input Delay), CLS (Cumulative Layout Shift)
- Identify worst-performing pages
- Document baseline scores

Test mobile responsiveness

- Open site on phone/tablet
- Check: layout, buttons, forms are functional
- Verify content is readable on small screens
- Test touch interactions

Verify HTTPS is implemented site-wide

- Check all pages load as HTTPS (noting that if the home page is fine they are usually all good)
- No mixed content warnings
- Security certificate is current

Audit robots.txt and XML sitemap

- Is your XML sitemap submitted to Search Console?
- Does robots.txt properly allow crawlers?
- Are important pages included in sitemap?

Strategic Initiatives to Consider

Improve page speed if needed

- Focus on pages with worst Core Web Vitals
- Optimize images (compression, modern formats)
- Reduce JavaScript/CSS bloat
- Implement lazy loading
- Consider CDN for static assets

Test crawlability with multiple user agents

- Crawl site with Screaming Frog
- Check for 404s, 500s, redirects
- Verify important pages are accessible
- Test with AI crawler user agents if possible

Audit and fix 404 errors

- Identify broken links/pages
- Fix links if content still exists
- Implement 301 redirects if moving content
- Update internal links

Review redirect chains

- Identify long redirect chains (3+ hops)
- Consolidate where possible
- Document redirect strategy

Verify canonical tags are correct

- Check for duplicate content issues
- Ensure canonical tags point to correct version
- No self-referential canonicals on unique pages

Current State Assessment

Page Speed (Core Web Vitals): Current: ☐ Poor (<50) ☐ Fair (50-89) ☐ Good (90+) ☐ Excellent (95+)

Mobile Responsiveness: Current: ☐ Not mobile-friendly ☐ Issues present ☐ Generally responsive ☐ Optimized

HTTPS/Security: Current: ☐ HTTP only ☐ Partial HTTPS ☐ Full HTTPS ☐ Full HTTPS + strong cert

Crawlability: Current: ☐ Significant issues ☐ Some problems ☐ Generally accessible ☐ Clean crawl

URL Structure: Current: ☐ Unclear/complex ☐ Adequate ☐ Clear and logical ☐ SEO-optimized

Competitive Positioning

☐ Our technical performance is BETTER than competitors ☐ Our technical performance is SIMILAR to competitors ☐ Our technical performance is WORSE - need improvements

Technical Data Notes

Important caveat: If you're using WordPress or similar platforms, some crawl "errors" in Screaming Frog are platform artifacts, not actual problems. Always verify through manual testing or Google Search Console before assuming something is broken.

Current technical concerns to verify:

Implementation Notes

What are your biggest technical speed/accessibility bottlenecks?

AREA 8: Content Formatting for AI Extraction

Why this matters: How you format content directly impacts how easily AI systems can extract and understand it.

Key Items to Address

Convert dense paragraphs to scannable lists

- Identify pages with long text blocks
- Convert lists of items to bulleted lists
- Use numbered lists for steps/processes
- Keep text shorter and punchier

Use bold/emphasis for key claims

- Identify most important statements
- Bold or emphasize with color
- Make key facts stand out
- Don't overdo it (should be rare)

Create tables for comparison/data

- Find places where you're presenting comparisons in text
- Convert to comparison tables
- Makes extraction much easier for AI

Shorten paragraphs and sentences

- Review key pages for paragraph length
- Aim for 3-4 sentences per paragraph maximum
- Shorter sentences (under 20 words where possible)
- Improves both readability and extractability

Strategic Initiatives to Consider

Implement Q&A formatting on pages with common questions

- Identify content that answers questions
- Reformat as explicit Q&A
- Each Q&A is its own section
- Makes extraction unambiguous

Add definition boxes for key terms

- Identify important terminology
- Create callout/definition boxes
- Visual style distinguishes definitions
- Helps AI extract definitions accurately

Format statistics with proper context

- Ensure each statistic has surrounding context
- Include: source, year, sample size where relevant
- Use highlighting or callout for numbers
- Makes data extraction accurate

Create infographics or visual summaries

- Identify complex concepts that could be visual
- Create simple, clean infographics
- Always include text alternative/summary
- AI systems can now see images, but text helps

Current State Assessment

Use of Lists (Bulleted/Numbered): Current: ☐ Minimal ☐ Occasional ☐ Regular ☐ Consistent throughout

Bold/Emphasis Usage: Current: ☐ Minimal ☐ Some ☐ Moderate ☐ Strategic emphasis on key points

Tables for Data/Comparison: Current: ☐ No tables ☐ Few tables ☐ Regular usage ☐ Comprehensive

Paragraph/Sentence Length: Current: ☐ Often long ☐ Mixed ☐ Generally short ☐ Consistently concise

Question/Answer Format: Current: ☐ Not used ☐ Occasional ☐ Regular ☐ Systematic

Competitive Positioning

☐ Our formatting is EASIER to scan/extract than competitors ☐ Our formatting is SIMILAR to competitors ☐ Our formatting is HARDER to scan - needs improvement

Implementation Notes

Which pages need the most reformatting for scannability?

AREA 9: Entity Establishment & Brand Consistency

Why this matters: AI systems need to recognize you as a distinct entity. Consistency helps with that recognition.

Key Items to Address

Audit NAP consistency

- Check: Name, Address, Phone are consistent across all platforms
- Verify in: website, Google Business Profile, directories, social media
- Document any inconsistencies
- Plan corrections

Verify brand name consistency

- Does your name appear consistently across site?
- Check for variations (abbreviated, alternate spellings)
- Ensure primary brand name is dominant

Audit social media profile links

- Does your website link to social profiles?
- Are profiles complete and consistent?
- Do profiles link back to website?

Create/update brand guidelines documentation

- Document how your brand name should appear
- Show logo usage
- Define consistent messaging
- Share with team/vendors

Strategic Initiatives to Consider

Fix all NAP inconsistencies

- Update directories and profiles where inconsistencies found
- Add your business to major directories if missing
- Request corrections on external sites
- Track corrections

Build brand mentions across the web

- Create list of industry directories, associations
- Add your business where relevant
- Ensure consistent brand name and description
- Include website link where possible

Encourage team brand consistency

- Train team on brand guidelines
- Create templates for social media, email
- Ensure consistent messaging
- Monitor for consistency

Build co-citations

- When you mention other brands/experts, are you cited back?
- Encourage backlinks through relationships
- Create link-worthy content others want to cite
- Participate in industry associations/groups

Current State Assessment

NAP Consistency: Current: ☐ Significant inconsistencies ☐ Some variations ☐ Mostly consistent ☐ Fully consistent

Brand Name Consistency: Current: ☐ Varies significantly ☐ Some variations ☐ Mostly consistent ☐ Always consistent

Social Profile Linking: Current: ☐ Not linked ☐ Partial links ☐ Most linked ☐ All linked and consistent

Directory Listings: Current: ☐ Not listed ☐ Limited listings ☐ Good coverage ☐ Comprehensive

Knowledge Panel/Recognition: Current: ☐ No Knowledge Panel ☐ Incomplete KP ☐ Present KP ☐ Rich KP with images

Competitive Positioning

☐ We have STRONGER entity establishment than competitors ☐ We have SIMILAR establishment as competitors ☐ We have WEAKER establishment - need to catch up

Implementation Notes

Where are your biggest brand consistency gaps? Which directories are most important for your industry?

AREA 10: Natural Language & Conversational Content

Why this matters: AI systems understand how people actually ask questions. Your content should match those natural questions.

Key Items to Address

Research common customer questions

- Review: customer emails, chat logs, support tickets
- Note: actual questions people ask
- Collect 20+ recurring questions
- Document patterns in how questions are phrased

Review content for natural language

- Are your headings phrased as questions (when appropriate)?
- Do you use conversational language or formal/stiff language?
- Identify pages that feel overly formal
- Plan to make more conversational

Add "People Also Ask" coverage

- Research: what questions do people ask after your main topic?
- Add sections addressing these related questions
- Include natural language variations

Optimize for voice search patterns

- Voice searches are more conversational
- Add content addressing voice query patterns
- Include: "how to," "what is," "best way to," etc.

Strategic Initiatives to Consider

Build question-based content strategy

- Create list of all questions your ideal customers might ask
- Organize by topic/category
- Identify gaps in your content
- Plan new content to fill gaps
- Create service/product specific FAQs with Schema and place on relevant pages.

Rewrite key pages with conversational tone

- Take formal/stiff pages
- Rewrite in more conversational style
- Use "you" language where appropriate
- Include real examples and stories

Create long-tail query content

- Identify long-tail questions (3-5+ word questions)
- Create dedicated content for each
- Use natural language phrasing
- Address the specific question directly

Add contextual language synonyms

- Identify key topic terms
- Include natural synonyms in content
- Helps AI understand different ways people talk about topics

Current State Assessment

Question-Based Content: Current: ☐ Minimal ☐ Some ☐ Moderate ☐ Comprehensive

Conversational Tone: Current: ☐ Formal/stiff ☐ Mixed ☐ Generally conversational ☐ Natural throughout

Long-Tail Query Coverage: Current: ☐ Not addressed ☐ Partial ☐ Good coverage ☐ Comprehensive

Natural Language Variations: Current: ☐ Limited ☐ Some variation ☐ Good variation ☐ Extensive

Voice Search Optimization: Current: ☐ Not optimized ☐ Minimal ☐ Some optimization ☐ Optimized

Competitive Positioning

☐ Our content is EASIER to understand naturally than competitors ☐ Our content feels SIMILAR to competitors ☐ Our content feels more FORMAL than competitors

Implementation Notes

What are the 15-20 most common questions your ideal customers ask? How do they phrase them naturally?

AREA 11: Content Depth & Competitive Position

Why this matters: AI systems cite the most authoritative, comprehensive sources. Depth is a credibility signal.

Key Items to Address

Identify top 3-5 competitors

- Who ranks for your key topics currently?
- Who are your biggest competitive threats?
- Document their URLs

Compare word count on priority pages

- For your 5 most important pages
- Compare to competitors' equivalent pages
- Note differences in length and depth
- Is your content notably shorter?

Audit content gaps vs. competitors

- What topics do competitors cover that you don't?
- What examples/case studies do they include?
- What data/research do they reference?
- Create list of gaps

Identify unique perspectives/angles

- Where can YOU be different from competitors?
- What unique expertise do you have?
- What original insights can you share?
- Document your differentiation angles

Strategic Initiatives to Consider

Expand key pages to be more comprehensive

- Start with highest-priority/highest-traffic pages
- Add missing topics from competitive analysis
- Include more examples, case studies, data
- Increase depth and authoritativeness

- Target length: longer than competitors IF appropriate

Add unique research/original data

- Conduct survey, analysis, or study
- Publish results with full methodology
- This becomes highly citable content

Create unique frameworks/methodologies

- Develop proprietary approach to solving problems
- Document and explain your methodology
- Make it unique and defensible

Build expert-level detail content

- Create content for advanced practitioners
- Go deeper than basic "how to" content
- Include edge cases, exceptions, nuance

Current State Assessment

Content Length vs. Competitors: Current: ☐ Significantly shorter ☐ Somewhat shorter ☐ Similar ☐ Notably longer

Content Depth vs. Competitors: Current: ☐ More surface-level ☐ Similar depth ☐ Deeper ☐ Notably more expert

Unique Insights/Perspectives: Current: ☐ Similar to competitors ☐ Some unique angles ☐ Clear differentiation ☐ Strong unique positioning

Original Research/Data: Current: ☐ None ☐ Very little ☐ Some ☐ Comprehensive original research

Topic Coverage vs. Competitors: Current: ☐ Missing major topics ☐ Most topics covered ☐ Complete coverage ☐ Expanded beyond competitors

Competitive Positioning

☐ Our content is DEEPER/MORE COMPREHENSIVE than competitors ☐ Our content is SIMILAR to competitors ☐ Our content is SHALLOWER - need to expand depth

Your Competitive Advantages

What can you do better or different than competitors?

1. _____
2. _____

3.

Implementation Notes

Which pages should you expand first? What unique angle can you develop that competitors don't have?

AREA 12: Citation-Worthy Elements

Why this matters: AI systems specifically look for content that's been fact-checked, sourced, and genuinely authoritative enough to cite.

Key Items to Address

Audit existing case studies

- If you have case studies, are they specific enough?
- Do they include: client type, problem, solution, results (with numbers)?
- Make results specific, not vague ("improved by 20%" not "greatly improved")

Add source citations to key claims

- Review your top 5 pages
- Identify claims that should be sourced
- Add links to authoritative sources
- Include footnotes or inline citations

Create expert quotes/testimonials

- Identify experts in your field
- Request quotes on your content
- Feature their expertise prominently
- Creates citation authority

Document your research/methodology

- If you have original data, make methodology transparent
- Show how you collected/analyzed data
- Include sample size, time period, methods
- Builds credibility

Strategic Initiatives to Consider

Conduct original research/survey

- Design a study relevant to your industry
- Conduct with meaningful sample size
- Analyze results
- Publish full findings with methodology

- This is highly citable content

Create detailed case studies

- Take best client examples
- Write detailed case studies with:
 - Challenge/problem
 - Solution/approach
 - Results (specific metrics)
 - Timeline
 - Client context/industry
- Aim for 2,000+ word comprehensive case studies

Develop downloadable resources

- Create white papers, guides, templates
- Make them genuinely useful (not just marketing)
- Include research, frameworks, tools
- Make them share-worthy

Build proprietary research database/tool

- Create original data resource specific to your expertise
- Examples: industry benchmarks, salary data, market analysis
- Make it publicly available and reference-worthy

Current State Assessment

Original Research: Current: ☐ None ☐ Minimal ☐ Occasional ☐ Regular/comprehensive

Case Studies: Current: ☐ None ☐ Few, vague ☐ Good, specific ☐ Comprehensive & detailed

Expert Content: Current: ☐ No quotes ☐ Occasional quotes ☐ Regular features ☐ Expert voices prominent

Source Citations: Current: ☐ Minimal ☐ Some ☐ Good coverage ☐ Comprehensive

Downloadable Resources: Current: ☐ None ☐ Few ☐ Several ☐ Comprehensive resource library

Citation Frequency: Current: ☐ Rarely cited ☐ Occasionally cited ☐ Regularly cited ☐ Frequently cited/reference point

Competitive Positioning

☐ Our content is MORE citable/reference-worthy than competitors ☐ Our content is SIMILAR in citation-worthiness ☐ Our content is LESS citable - need to develop original material

Implementation Notes

What unique research could you conduct? What are your best case studies that could be expanded?

AREA 13: Multi-Format Optimization

Why this matters: AI systems can now process images, videos, and other formats. Properly formatted media increases accessibility and citation-worthiness.

Key Items to Address

Audit image alt text

- Review 10-20 key pages
- Check that images have descriptive alt text
- Alt text should describe image + context
- Avoid keyword stuffing in alt text

Add contextual descriptions around images

- Images shouldn't exist in isolation
- Add text describing why image is included
- Explain what reader should take from image
- Makes image context clear to AI systems

Check image file naming

- Do images have descriptive filenames?
- Or are they "image001.jpg"?
- Rename important images descriptively
- Helps AI systems understand image content

Add captions to videos

- Do your videos have captions/transcripts?
- If not, this is a gap
- Add captions to key video content
- Improves accessibility and AI understanding

Strategic Initiatives to Consider

Create comprehensive video transcripts

- Select important video content
- Create full transcripts
- Make transcripts available to viewers

- Include timestamps if helpful

Audit and optimize PDF accessibility

- If you have PDFs, are they text-extractable?
- Add text layer if needed
- Include alt text for images in PDFs
- Make sure PDFs are scannable

Create infographics with text alternatives

- Develop visual summaries of key concepts
- Always include text description/summary
- Make infographic content scannable
- Improves both accessibility and AI understanding

Implement structured data for media

- Add schema markup for images and videos
- Include descriptions, URLs, etc.
- Helps AI systems understand media context

Current State Assessment

Image Alt Text: Current: ☐ Minimal/missing ☐ Partial ☐ Most images tagged ☐ Comprehensive

Contextual Descriptions Around Media: Current: ☐ Images standalone ☐ Some context ☐ Usually described ☐ Systematically described

Video Transcripts: Current: ☐ None ☐ Few ☐ Most ☐ All videos

PDF Accessibility: Current: ☐ Not accessible ☐ Partially accessible ☐ Generally accessible ☐ Fully optimized

Infographics/Visual Content: Current: ☐ Minimal ☐ Some ☐ Regular ☐ Comprehensive

Media File Naming: Current: ☐ Generic names ☐ Mixed ☐ Mostly descriptive ☐ Consistently descriptive

Competitive Positioning

☐ Our media optimization is MORE comprehensive than competitors ☐ Our media optimization is SIMILAR to competitors ☐ Our media optimization is LESS comprehensive - need to catch up

Implementation Notes

What visual content could you create? How many videos need transcripts?

SUMMARY ASSESSMENT

Your AI Readiness Scoring

For each area, rate your current position (1-4):

- 1 = Minimal/Weak
- 2 = Partial/Moderate
- 3 = Good/Strong
- 4 = Excellent/Comprehensive

Area	Score (1-4)
1. Authority & Expertise	___
2. Content Comprehensiveness	___
3. Structured Data	___
4. Content Freshness	___
5. Summary & Extraction	___
6. Internal Linking	___
7. Technical Foundation	___
8. Content Formatting	___
9. Entity Establishment	___
10. Natural Language	___
11. Content Depth	___
12. Citation-Worthy Elements	___
13. Multi-Format	___
TOTAL	___ / 52

Your AI Readiness Score: ___ out of 52 (Divide by 52, multiply by 10 for 0-10 scale: ___ / 10)

Score Interpretation

- **7-10:** Excellent positioning for AI search visibility. You're ahead of most competitors.
- **5-7:** Good foundation with clear opportunities. Strategic focus will unlock significant gains.
- **3-5:** Moderate readiness. Foundational work needed, but significant upside with 90-day focus.
- **1-3:** Early stage. Start with quick wins in 2-3 core areas before scaling.

FROM CHECKLIST TO STRATEGY

What This Checklist Provides:

This checklist shows you the 13 core areas of AI search optimization and helps you assess your current state across each. It teaches you what matters and why, and gives you concrete items to consider in each area. This is the foundation of knowledge.

That said, you'll need to assimilate the following to make the most of it:

- **Competitive Context:** Your competitive position determines which initiatives matter most. A company with strong authority signals should prioritize content depth over credential-building. A company with weak technical foundation needs to fix that before anything else matters.
- **Resource Capacity:** What to tackle first depends on your team size, budget, and available time. The right sequence is different for a solo practitioner vs. a marketing team.
- **Business Goals:** Your business objectives change the emphasis. A company focused on lead generation needs different prioritization than one focused on brand authority.
- **Technical Dependencies:** Some initiatives must happen before others. Your technical foundation enables everything else. Your content structure must be sound before you invest heavily in expansion.
- **Velocity & Momentum:** Strategic sequencing creates early wins that build momentum and confidence, which accelerates subsequent progress.
- **Competitive Advantage:** Which initiatives will differentiate you in YOUR specific market? What can you own uniquely? This requires market knowledge and strategic insight.

This is where consulting and professional prioritization creates the most value—connecting your specific situation to the framework, creating a roadmap that's tailored to your business, resources, and competitive context.

RESOURCE ALLOCATION

Self-Assessment Questions:

- Who on your team should lead the overall strategy?
- Who owns content creation vs. technical implementation?
- What's your available time/budget for this optimization?
- Do you need external support for certain areas (technical, content, design)?

This is where strategic guidance helps you allocate resources effectively to your unique situation.

NEXT STEPS

This checklist is designed to help you understand what AI search optimization requires. Use it to:

1. **Self-assess your current position** - Go through each area and rate yourself honestly
2. **Learn what matters** - Understand WHY each area exists and how it connects to AI search visibility
3. **Identify your opportunities** - See what's possible and what's been missed
4. **Make informed decisions** - Decide what you can tackle internally vs. where you need support

The strategic questions this checklist doesn't answer—but that matter most:

- Which of these 13 areas should YOU focus on first?
- Which will have the biggest impact for YOUR competitive position?
- How do you sequence this to build momentum and show early wins?
- How much should you invest in each area relative to your resources?
- What does success look like for YOUR specific business?

Looking for Help?

We're pleased to offer flexible options...

Strategy & Prioritization - Expert Roadmap

Best for: Teams with solid technical and content capabilities who need clarity on the right priorities.

We review your site, competitive position, and business goals, then create a prioritized 90-day action plan based on the 13-area framework. You get strategic direction on what matters most—then your team executes.

Includes: Comprehensive site audit, competitive analysis, prioritized roadmap, and clear implementation guidance.

You handle: Execution of prioritized initiatives.

Strategy + Execution Support - Collaborative Partnership

Best for: Teams who want strategic guidance but lack the in-house resources to tackle everything quickly.

We establish your priorities together, then collaborate on implementation. You own what makes sense to do internally; we handle the areas where you need support (content creation, technical implementation, strategic content pieces, etc.).

Includes: Everything from Strategy & Prioritization, plus hands-on execution support in agreed-upon areas.

You handle: What you're equipped to do internally; we fill in the resource gaps.

Done For You - Fully Managed

Best for: Teams that want expert management of the entire AI search optimization process.

We own the whole thing—audit, strategy, planning, and execution. We become an extension of your team, managing all AI search optimization work against your goals and budget.

Includes: Full audit, strategy, content creation, technical implementation, ongoing optimization, and regular reporting.

You handle: Being available for strategic input and approvals; we handle everything else.