

Insider Insights: Generative AI Optimization Checklists

These checklists are actionable steps organized by the three phases of Generative Engine Optimization: **Presence**, **Appearance**, and **Relevance**. Work through them in order – Phase 1 builds the foundation, Phase 2 makes you findable, and Phase 3 makes you usable.

How to use these checklists: Start with a free AIView assessment at trustinsights.ai/aiview to identify your highest-priority gaps, then work through the checklists for the phases where your scores are lowest.

A note on AI and “rankings”: Unlike traditional search, AI systems have no fixed rankings. Results are probabilistic – the same query can surface different sources at different times. These tactics improve your probability of appearing, not your guaranteed position. Measure over 90–180 days, not weeks.

Phase 1: Presence

Making AI models know you exist – off-site distribution and training data

Phase 1 focuses on getting your brand, name, and content into the training data and retrieval sources that AI models draw from. If AI doesn't know you exist, it can't mention you.

Step 1: Start with an AI Presence Audit

- ☐ **Run the free AIView tool** at trustinsights.ai/aiview to get a scored assessment across Meta Information, Content Structure, Structured Data, and Content Alignment.
- ☐ **Ask AI assistants directly:** Query ChatGPT, Google Gemini, Claude, and Perplexity with questions your customers would ask. Note whether your brand appears in the answers.
- ☐ **Generate 25 customer search queries:** Use this prompt – “Act as my ideal customer. Generate 25 questions they would ask an AI assistant when researching [your product/service category].” Run those queries against AI tools and audit where you appear.

Step 2: Enable Platform AI Training Permissions

- ☐ **YouTube:** In YouTube Studio, go to **Settings > Channel > Advanced > Allow third-party AI models and search engines to use your content**. This setting is **off by default** – enable it.
- ☐ **Substack:** Substack **defaults to allowing AI training** on your public content. Verify this default is in place. To opt out, navigate to Settings > Subscriber Preferences > Content Licensing.

- ☐ **robots.txt:** Review your robots.txt file. Unless you have specific strategic reasons, allow access for all user-agents. Consider managing this through your CDN (Cloudflare, Akamai) for easier control without server access.

Step 3: Guest Appearances and Off-Site Rich Media

Rich media appearances — podcasts, video, webinars — give AI models multiple data points: the audio/video itself, auto-generated transcripts, captions, and any associated text.

- ☐ **Actively seek guest opportunities** on podcasts, YouTube channels, webinars, and live streams relevant to your industry.
- ☐ **Prioritize rich media formats** — video and audio provide more AI training data than text-only placements.
- ☐ **Develop a pitch strategy** highlighting your expertise and value to the host's audience.
- ☐ **Maintain a calendar** for tracking and managing guest appearance requests and follow-ups.

During every appearance:

- ☐ **Name-drop your company and domain deliberately** — alternate between your company name ("Trust Insights") and your domain ("trustinsights.ai") throughout the conversation. Repetition builds AI associations.
- ☐ **Enunciate brand names clearly** — AI training data often comes from auto-generated transcripts, and unclear pronunciation creates transcription errors that break the brand association.
- ☐ **Prepare key talking points** to ensure consistent brand messaging across every appearance.
- ☐ **Confirm your byline** appears in all associated show notes, blog posts, or event pages — include your name, company name, and website URL.

Step 4: Press Releases and Traditional PR

- ☐ **Create press releases optimized for AI consumption:** clear language, key facts, strategic repetition of your brand name and domain.
- ☐ **Prioritize breadth of wire service distribution** over placement quality — PR Newswire, Business Wire, and similar services feed content into Common Crawl and other datasets used for LLM training.
- ☐ **Target the widest possible range of online publications** — small and mid-tier outlets that AI crawlers index count. Machine readability across many sources matters more than a single high-authority placement.
- ☐ **Seek inclusion in industry newsletters with web archives** (Substack, Beehive, and similar) — newsletter content with a public web presence is crawled and ingested by AI models.

Step 5: Social Media for AI Corpus Building

- ☐ **Post consistently on platforms known to supply AI training data:** Meta (Facebook, Instagram), LinkedIn, and X/Twitter.
- ☐ **Include links back to your website** in social posts to build association between your social presence and your owned content.
- ☐ **Focus on keyword-rich, topically relevant content** rather than optimizing purely for engagement.
- ☐ **Use social media schedulers** to maintain a consistent presence even during low-activity periods.

Step 6: Reviews, Discussions, and Community Mentions

- ☐ **Solicit customer reviews** on Google Reviews and relevant industry review platforms.
- ☐ **Monitor Reddit, Quora, Ask.com, and industry forums** for mentions of your brand and relevant topics.
- ☐ **Engage authentically** in conversations where you can contribute expertise – user-generated content mentioning your brand feeds AI training data.

Step 7: Repurpose and Amplify Guest Content

- ☐ **Obtain permission to embed guest appearance videos and audio** on your own website.
- ☐ **Publish transcripts of guest appearances** on your site alongside embedded media.
- ☐ **Promote every guest appearance** across your social media channels and newsletter.

Step 8: Use AI Research Tools to Find Target Platforms

- ☐ **Use AI deep research features** (Gemini Deep Research, Perplexity Deep Research) to simulate how your customers research your category.
- ☐ **Analyze the sources and platforms** that AI research tools consistently cite for your topics.
- ☐ **Prioritize those platforms** for your off-site optimization and guest appearance outreach.
- ☐ **Repeat this research quarterly** to adapt as AI source preferences evolve.

Step 9: Measure Phase 1 Outcomes

- ☐ **Add “How did you hear about us?” to your contact and inquiry forms.** In the GEO era, this is your most direct ground-truth signal. When someone says “ChatGPT recommended you,” that’s a confirmed GEO conversion.
- ☐ **Track AI referral traffic in GA4** using the segment configurations in the companion *How to Track AI Searches* guide.

- ☐ **Monitor AI crawler activity** using CDN logs (Cloudflare, Akamai) to see which AI systems are crawling your site and how frequently.
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Phase 2: Appearance

Making AI find and surface your content – discoverability and content structure

Phase 2 focuses on ensuring your content is comprehensive, well-structured, and directly answers the questions your customers ask AI tools. If AI can find you but your content doesn't answer the query, you won't be cited.

Step 1: Fan-Out Query Content Audit

- ☐ **Generate 25 customer search queries** (same prompt as Phase 1, Step 1.3).
- ☐ **Map each query to existing content:** Do you have a page, post, or FAQ that directly answers each question?
- ☐ **Identify content gaps** – queries for which you have no clear, on-site answer.
- ☐ **Prioritize creating content** for high-value queries where you have no coverage.

Step 2: Comprehensive FAQ Pages

- ☐ **Build and maintain comprehensive FAQ pages** covering the full range of questions your customers ask.
- ☐ **Incorporate your brand name, domain, and relevant keywords** naturally in both the questions and the answers.
- ☐ **Implement FAQ structured data markup (FAQPage schema)** to help AI models and search engines identify and use FAQ content.
- ☐ **Organize FAQs by topic cluster** rather than by frequency alone – logical grouping helps both humans and AI.
- ☐ **Update FAQs regularly** as new customer questions emerge from sales conversations, support tickets, and reviews.

Step 3: Content Depth via AI-Driven Question Generation

- ☐ **For each major piece of content**, ask an AI tool: “Here is my article. What questions might a reader still have after reading this? What follow-up questions would they ask an AI assistant?”
- ☐ **Incorporate answers to those questions directly into the content** – expand sections, add new paragraphs, or link to dedicated posts.
- ☐ **Iteratively refine content** to increase depth and comprehensiveness over time.

Step 4: Transmedia Content Strategy for Discoverability

Reaching AI models requires distributing content in every format, on every platform they index.

- ☐ **Adopt a video-first content model:** create video as the primary format, then systematically repurpose.
- ☐ **Extract audio** for podcast distribution.
- ☐ **Transcribe and rewrite** video content into blog posts, articles, and website copy.
- ☐ **Create visual summaries:** checklists, infographics, downloadable PDFs.
- ☐ **Condense key takeaways** for social media (text posts, short-form video scripts).
- ☐ **Ensure consistent branding and messaging** across all content formats.

Step 5: Captioning and Subtitling for All Media

- ☐ **Create captions and subtitles for all video and audio content** – transcripts are the primary way AI models extract meaning from media.
- ☐ **Use industry-standard formats** (SRT, VTT) for caption files.
- ☐ **Use AI transcription services** (Fireflies, Otter, Whisper.cpp) to generate transcripts, then review and edit for accuracy – especially for brand names, product names, and technical terms.
- ☐ **Upload caption files** to all distribution platforms: YouTube, podcast hosts, website embeds.

Step 6: Content Housekeeping and Refreshing

- ☐ **Conduct regular content audits** to identify outdated, inaccurate, or off-brand content.
- ☐ **Update and refresh high-value content** to signal ongoing expertise and relevance to AI engines.
- ☐ **Prune content that no longer reflects your brand or expertise** – de-index or remove rather than letting dilutive content undermine your signal.

Phase 3: Relevance

Making AI understand and accurately use your content – on-site optimization

Phase 3 focuses on ensuring the content AI models find on your site is clearly structured, semantically rich, and unambiguously associated with your brand. This is where AI decides whether to actually cite you.

Step 1: Content Priority Zones

- ☐ **Front-load key brand information in the first 400–600 words** of every page. AI crawlers often weight this content window most heavily. State your value proposition, brand name, and core offering near the top – don't save it for later.
- ☐ **Ensure navigation and content flow are linear and clear** – AI crawlers read pages like text, not like visual layouts. The AIView tool (trustinsights.ai/aiview) audits this automatically and flags pages where structure or content flow would confuse an AI crawler.

Step 2: On-Site Knowledge Blocks

- ☐ **Design a concise Knowledge Block** – a brief, text-based description of your organization that includes: mission or purpose, core services or products, target audience, and unique value proposition.
- ☐ **Integrate the Knowledge Block into your site's content templates** so it appears within the main content area of each key page – not in a sidebar, header, or site-wide footer outside the content flow.
- ☐ **Include your brand name, domain, and primary keywords** in every Knowledge Block instance.
- ☐ **Create author biography Knowledge Blocks** on contributor and team pages, linking individual expertise to your organization.

Step 3: Structural HTML and Semantic Markup

- ☐ **Use heading tags (H1-H6)** to define a clear, hierarchical content structure on every page.
- ☐ **Use ordered and unordered lists** to present scannable information – AI models parse lists effectively and often quote them directly.
- ☐ **Structure content with semantic HTML** – don't rely on CSS styling alone to imply organization; use the right tags for the right content.
- ☐ **Implement Schema.org markup and JSON-LD structured data** to explicitly define content types and entities (Organization, Person, Article, FAQ, Product, etc.).

Step 4: Image Alt Text with Brand Context

- ☐ **Develop and document guidelines for descriptive, brand-aware alt text** for all images.
- ☐ **For branded images** (logos, diagrams, framework visuals, product shots), include three elements:
 - o Your brand name (e.g., "Trust Insights")
 - o A description of the image content (e.g., "5P Framework for AI marketing strategy")
 - o Relevant keywords (e.g., "AI marketing framework, management consulting")
- ☐ **Ensure all content creators apply these guidelines** consistently across every image on the site.

Step 5: Topical Richness – Jargon, Terminology, and Citations

- ☐ **Use industry-specific terminology and jargon naturally** throughout your content to signal topical expertise to AI models – they evaluate authority by vocabulary as well as structure.
- ☐ **Cite relevant experts, research, and industry sources** – AI models learn associations between topics and recognized authorities.
- ☐ **Link to cited sources** to reinforce those topical associations.

- ☐ **Balance technical depth with accessibility** – write for your audience first; AI comprehension follows human readability.

Step 6: Technical Performance

- ☐ **Optimize website loading speed**: target a page weight under 2MB for AI crawler efficiency.
- ☐ **Ensure mobile-friendliness** – standard technical health correlates with crawler efficiency.
- ☐ **Consider enabling a CDN “Markdown for Agents” feature** (Cloudflare and others offer this toggle) – serves lightweight markdown versions of your pages to AI crawlers, making content parsing cleaner and more reliable.
- ☐ **Manage your robots.txt via CDN** (Cloudflare, Akamai) to allow appropriate AI crawler access without requiring server file changes.

Step 7: AI-Readable Content Formats (Experimental)

- ☐ **Consider creating an llms.txt file** at `yourdomain.com/llms.txt` with a brief, AI-readable summary of your site’s content and purpose. > **Important caveat**: As of early 2026, no major AI system has confirmed it uses llms.txt for recommendations or knowledge retrieval. Google’s John Mueller stated publicly in June 2025 that no AI uses it. The GEO 101 course also notes it “doesn’t seem to help.” Treat this as an experiment, not a primary tactic. The core idea – providing a concise, crawlable summary of your site – has merit even if this specific format has limited adoption.

Step 8: Measurement and Tracking

- ☐ **Set up GA4 AI traffic segments** for Perplexity (perplexity.ai), ChatGPT (chatgpt.com), Google Gemini (gemini.google.com), and other AI referrers – use the companion *How to Track AI Searches* guide for step-by-step segment configurations.
- ☐ **Monitor AI crawler activity** using CDN or DNS logs to understand which AI systems access your content and how frequently.
- ☐ **Use contact form “How did you hear about us?” data** as your ground-truth outcome metric – this captures GEO conversions that session-based traffic analytics miss.
- ☐ **Set realistic timelines**: GEO results are probabilistic and gradual. Evaluate trends over 90–180 days minimum.

Resources

Course Resources

- **GEO 101 for Marketers** – the course this checklist accompanies: (trustinsights.ai/geo101)
- **AIView Tool** – free AI presence audit for your website: trustinsights.ai/aiview



- **Analytics for Marketers** – the free Trust Insights Slack community for ongoing GEO discussions and questions: trustinsights.ai/analytics-for-marketers

Trust Insights Learning Resources

- **Almost Timeless: 48 Foundation Principles of Generative AI**: A non-technical AI book by Christopher Penn teaching how to think about AI and apply it to your organization.
- **AI-Ready Strategist**: For CMOs and C-Suite leaders – frameworks for developing, deploying, and managing AI at any scale, with an emphasis on people, process, and governance.
- **Generative AI Use Cases for Marketers**: 7 major use case categories with 21 hands-on exercises, all data and prompts provided.
- **Mastering Prompt Engineering for Marketing**: 3 major prompt frameworks, advanced prompting techniques, and how to choose different prompts based on task and tool.

Trust Insights Services

- **Customized consulting**: Done-for-you analytics, data science, and AI implementation – from data governance to agentic AI deployment.
- **Keynote talks and workshops**: Customized keynotes and workshops for conferences, company retreats, executive leadership meetings, and roundtables.

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