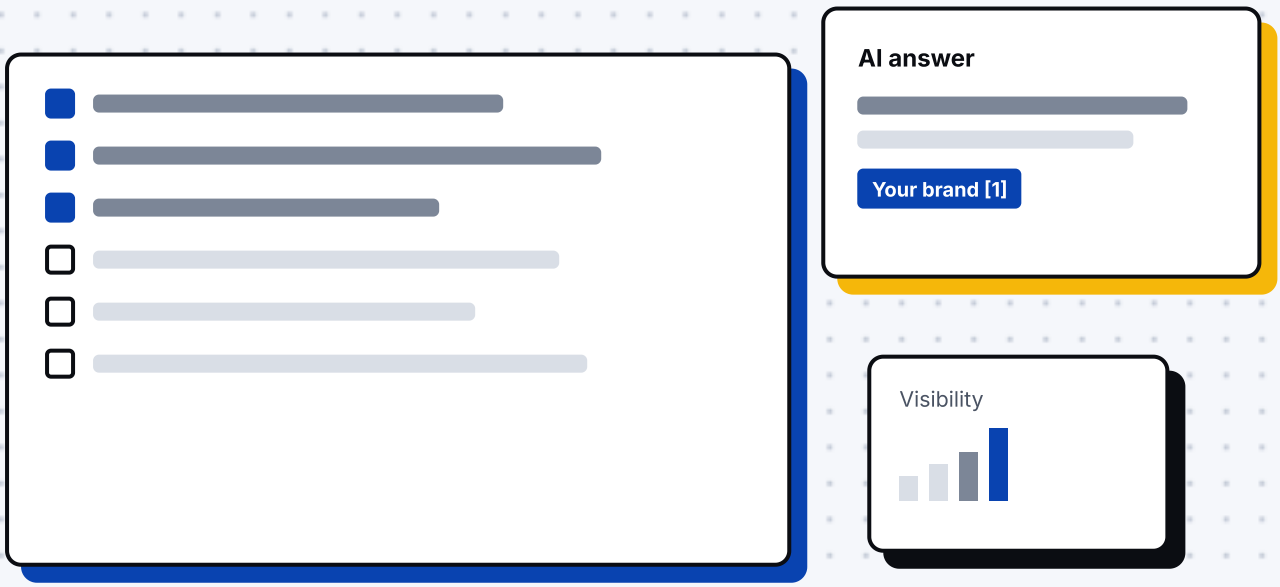
Perceptric

Checklist

GEO Checklist for B2B SaaS

56 checks to get your software named, cited and recommended in ChatGPT, Perplexity, Gemini, Claude and Google AI answers.



perceptric.com

2026 edition

Contents

01 What GEO is and how to use this checklist

02 Prompts, tracking and crawl access

03 Page structure and content AI can quote

04 Schema, entity data and third-party mentions

05 Brand signals, authors and measurement

06 Priority table

07 Your monthly GEO routine

01

CHAPTER ONE

What GEO is and how to use this checklist

Buyers now ask AI tools which software to shortlist. This chapter covers what shapes those answers and how to work through the 56 checks.

Why AI answers matter for B2B software

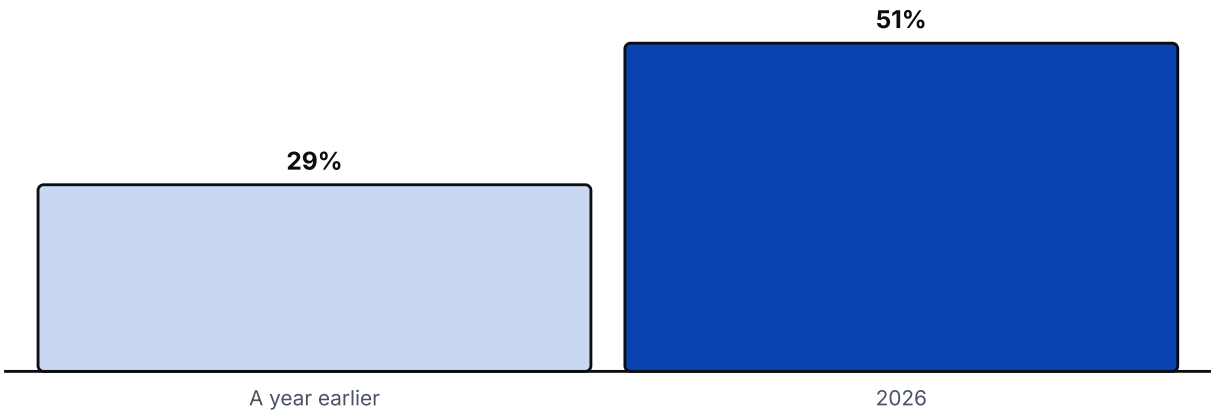
How the eight check groups fit together

A five step way to run the checklist with your team

Generative engine optimization (GEO) is the work of getting your brand named and cited when people ask AI tools like ChatGPT, Gemini or Claude for advice.

For a SaaS company, the prompts that matter most are buying questions. Buyers ask for the best tools in a category, alternatives to a known product and comparisons between two vendors.

B2B software buyers who start research in an AI chatbot more often than in Google



Source: G2, The Answer Economy research, 2026 (company.g2.com/news/g2-research-the-answer-economy)

AI tools answer these questions by searching the web and reading pages about you. Your site, review profiles, list articles, community threads and videos all shape what they say.

Visits that clicked a regular Google result



Source: Pew Research Center, Google users are less likely to click on links when an AI summary appears, 2025

0.664
correlation between brand web mentions and mentions in Google AI Overviews

0.218
correlation between backlinks and mentions in Google AI Overviews

Source: Ahrefs, study of 75,000 brands, 2025. G2 and Pew sources: G2, 2026, Pew Research Center, 2025.

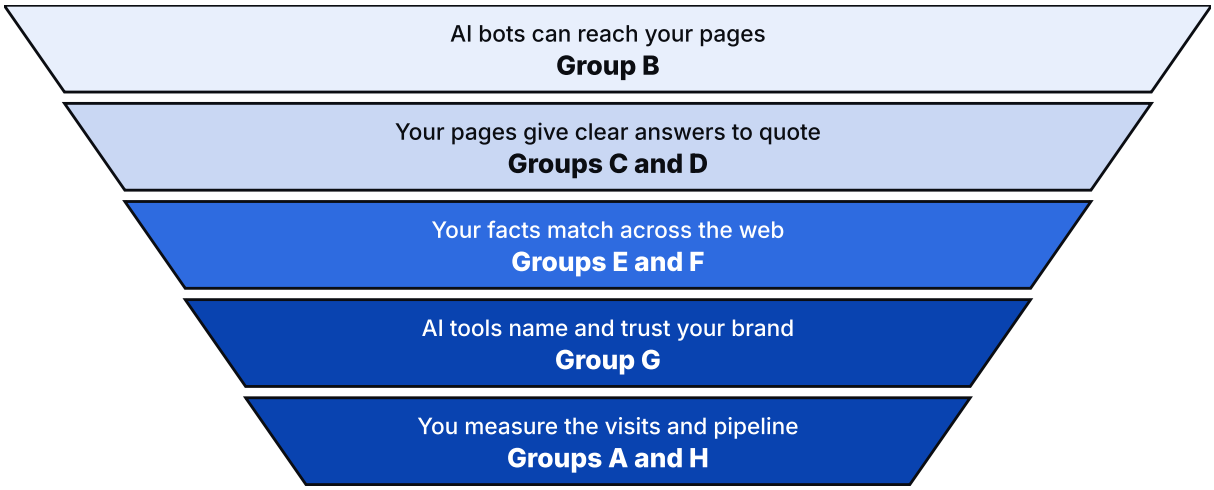
How the eight groups fit together

The 56 checks sit in eight groups. Each one is a single action with a short note on how to confirm it is done, so you can hand checks to different owners.

A. Prompts and tracking (7) | B. Crawl access (7) | C. Page structure (7) | D. Quotable content (7)

E. Schema and entities (6) | F. Third-party mentions (8) | G. Brand and authors (7) | H. Measurement (7)

Each layer depends on the one above it



Source: Perceptric framework

How to use this checklist

1. Baseline
Start with group A and record a baseline before you change anything.

→

2. Tick
Go through every group and tick what is already true today.

→

3. Pick ten
Use the priority table in chapter 6 to pick ten open checks.

→

4. Assign
Give each open check an owner and a due date.

→

5. Repeat
Run the chapter 7 routine and compare with your baseline.

02

CHAPTER TWO

Prompts, tracking and crawl access

You can't improve answers you haven't measured, and AI tools can't cite pages they can't reach. These two groups come first.

A. Prompts and tracking: 7 checks

B. Crawl access for AI bots: 7 checks

A robots.txt sample for AI search bots

A. Prompts and tracking

7 checks

Your prompt list is the base for every other check. Write it in the words buyers use on sales calls, then track it on each engine they use.

Prompt types to cover

Category, use case, comparison, alternatives and brand questions.

- [ ] **A1** Write 30 to 50 buyer prompts covering your category, use cases, comparisons and alternatives. Verify: your sales team has read the list and agrees buyers ask these questions.
- [ ] **A2** Tag every prompt with one funnel stage and one topic so you can report by group. Verify: no prompt in your tracker is missing a stage or topic tag.
- [ ] **A3** Add prompts that name competitors, such as "alternatives to [competitor]" and "[your brand] vs [competitor]". Verify: each main competitor appears in at least two prompts.
- [ ] **A4** Track your prompts in every AI tool your buyers use, including ChatGPT, Perplexity, Gemini, Claude, Copilot and Google AI Overviews. Verify: your tracker shows a fresh result for each prompt on each engine.
- [ ] **A5** Run each prompt several times per period, because AI answers change from one run to the next. Verify: your visibility number is an average of repeated runs.
- [ ] **A6** Save a dated baseline of visibility, position, sentiment and cited sources before you make changes. Verify: the baseline export sits in a shared folder with today's date.
- [ ] **A7** Export the domains each engine cites for your prompts and rank them by how often they appear. Verify: you have a top 20 list of cited domains to use in group F.

B. Crawl access for AI bots

7 checks

Each AI company runs separate bots for search and for model training. The search bots decide whether you can appear in answers, so treat them as a separate decision from training.

Search bots: allow

```
User-agent: OAI-SearchBot
Allow: /

User-agent: Claude-SearchBot
Allow: /

User-agent: PerplexityBot
Allow: /
```

Training bots: your choice

- GPTBot collects data for OpenAI model training.
- ClaudeBot collects data for Anthropic model training.
- OpenAI states that blocking GPTBot doesn't affect search visibility.

Bot names from OpenAI, Anthropic and Perplexity crawler docs, 2026.

- [ ] **B1** Allow OAI-SearchBot in robots.txt, since OpenAI leaves sites that block it out of ChatGPT search answers. Verify: open yoursite.com/robots.txt and test the rule in a robots.txt tester.
- [ ] **B2** Allow Claude-SearchBot and PerplexityBot, which index pages for Claude and Perplexity search results. Verify: neither bot falls under a Disallow rule, including a catch-all rule for every user agent.
- [ ] **B3** Make a written choice on training bots such as GPTBot and ClaudeBot. Verify: robots.txt matches the choice your legal team signed off.
- [ ] **B4** Check the bot settings in your CDN and firewall. Cloudflare changed its default to block AI crawlers on July 1, 2025. Verify: AI search bots are allowed in your CDN dashboard. Source: Cloudflare, 2025
- [ ] **B5** Review server logs each month for visits from AI user agents such as OAI-SearchBot, ChatGPT-User and PerplexityBot. Verify: these bots get a 200 response on your key pages.
- [ ] **B6** Serve your main text, prices and FAQs in the page HTML so bots can read them without running scripts. Verify: view the page source and find the key text there.
- [ ] **B7** Keep XML sitemaps current with accurate last modified dates in Google Search Console and Bing Webmaster Tools. Verify: both tools show your sitemaps processed with no errors.

AI bot quick reference

User agent	Company	What it does	Our advice
OAI-SearchBot	OpenAI	Finds pages to show in ChatGPT search answers	● Allow
ChatGPT-User	OpenAI	Visits a page when a ChatGPT user asks it to	● Allow
GPTBot	OpenAI	Collects data for model training	● Your choice
Claude-SearchBot	Anthropic	Indexes pages for Claude search results	● Allow
ClaudeBot	Anthropic	Collects data for model training	● Your choice
PerplexityBot	Perplexity	Indexes pages for Perplexity search results	● Allow

Sources: OpenAI, Anthropic and Perplexity crawler docs, 2026.

03

CHAPTER THREE

Page structure and content AI can quote

AI tools lift short, clear passages into their answers. Pages that answer one question near the top and back it with facts give them more to use.

C. Page structure and answers: 7 checks

D. Content AI can quote: 7 checks

What the research paper that named GEO found

C. Page structure and answers

7 checks

Answer the buyer's question in the first two sentences. Then back it with facts a reader can check.

The rule behind group C

- [ ] **C1** Open each key page with a direct answer to its main question in the first two or three sentences. Verify: the first paragraph read alone answers the question.
- [ ] **C2** Write H2 headings as the questions buyers ask, using wording from your tracked prompts. Verify: each key prompt maps to a heading on one page.
- [ ] **C3** Give each use case, industry and integration its own page with one clear topic. Verify: no two pages target the same buyer question.
- [ ] **C4** Put specs, plans, limits and feature lists in real HTML tables instead of images. Verify: you can select and copy the table text on the live page.
- [ ] **C5** Add a short FAQ to product, pricing and comparison pages using questions from sales calls. Verify: each answer is under 60 words and makes sense on its own.
- [ ] **C6** Show a visible last updated date and refresh your key pages every quarter. Verify: the page date matches the sitemap date.
- [ ] **C7** Link each hub page to its detail pages and link each detail page back. Verify: a site crawl shows no key page without internal links.

25.7%

fresher: how much newer AI-cited pages were than pages in Google's regular results

17M

cited URLs in the study, across several AI assistants

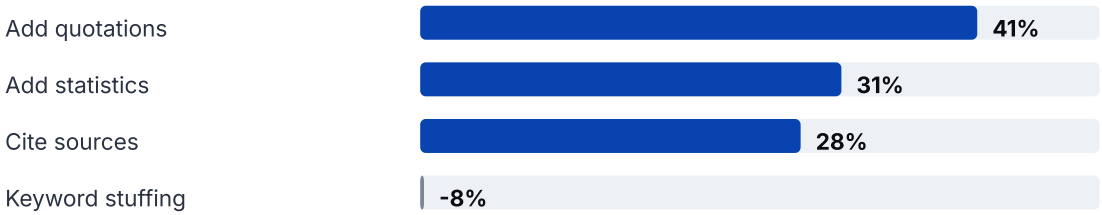
Source: Ahrefs, 2025

D. Content AI can quote

7 checks

The research paper that named GEO built a benchmark of 10,000 queries to test content changes. Adding quotes, statistics and cited sources raised a page's share of the answer the most, while keyword stuffing lowered it.

Change in visibility against the unedited page



Position-adjusted word count. Source: Aggarwal et al., GEO: Generative Engine Optimization, KDD 2024 (arxiv.org/abs/2311.09735)

- [ ] **D1** Add specific statistics with a named source and year to each product, category and comparison page. Verify: every number on the page links to its source.
- [ ] **D2** Add short quotes from named people, such as your product lead or a customer who agreed to be quoted. Verify: each quote shows the person's name and role.
- [ ] **D3** Write a one-sentence definition for each core term in your category and place it right under its heading. Verify: the sentence starts with "[Term] is" and reads clearly alone.
- [ ] **D4** Publish a fair comparison page for each main competitor and an alternatives page for your category. Verify: each page has a dated comparison table and a kind tone toward rivals.
- [ ] **D5** Publish original data at least twice a year, such as a buyer survey or a product usage benchmark. Verify: the report has a methods note and charts others can cite.
- [ ] **D6** Link out to the studies, docs and standards behind your claims so readers and AI tools can check them. Verify: key pages each have at least three outbound source links.
- [ ] **D7** Rewrite any paragraph that repeats keywords so it reads like plain speech. Verify: someone outside marketing reads it aloud without stumbling.

Paper: Aggarwal et al., GEO: Generative Engine Optimization, KDD 2024

04

CHAPTER FOUR

Schema, entity data and third-party mentions

AI tools build a picture of your company from your own markup and from what other sites say. Both need to agree on the same facts.

E. Schema and entity data: 6 checks

F. Third-party mentions: 8 checks

What our own AI answer tracking shows

E. Schema and entity data

6 checks

Google needs no special schema or AI text files for AI Overviews and AI Mode. Structured data still helps machines read your facts, and Google asks that it match the visible text on the page.

Source

Google Search Central, AI features and your website, 2026

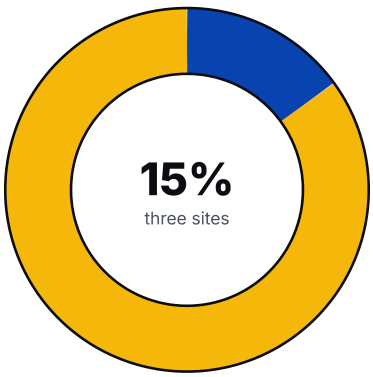
- [ ] **E1** Add Organization schema to your homepage with your name, logo, URL and sameAs links to LinkedIn, G2 and Crunchbase. Verify: the Schema Markup Validator shows no errors.
- [ ] **E2** Add SoftwareApplication schema to product pages with the category, platform and offers fields filled in. Verify: the price in the markup matches your pricing page.
- [ ] **E3** Add Article schema to blog posts with the author, the publish date and the last modified date. Verify: the author name links to a real author page.
- [ ] **E4** Use FAQPage markup only where the questions and answers appear on the page itself. Verify: every marked-up question is visible to readers.
- [ ] **E5** Write a one-page fact sheet with your name, category, founding year, location and plans, then match every profile to it. Verify: your site, LinkedIn, G2 and Crunchbase show the same facts.
- [ ] **E6** Check whether your company has a Wikidata item and correct any facts that are out of date. Verify: the item lists your official website and current description.

F. Third-party mentions

8 checks

Lists, reviews, communities and video carry a large share of what AI tools cite.

Sources listed in Google's AI summaries



Wikipedia, YouTube and Reddit	15%
All other sites	85%

Source: Pew Research Center, 2025

What this means for you

Three sites made up 15% of the sources in Google's AI summaries. Your brand needs a presence on the communities and video channels your buyers use, as well as on your own site.

- [ ] **F1** Sort your top 20 cited domains from check A7 by type, such as lists, review sites, communities, video and media. Verify: each domain has a type and an owner on your team.
- [ ] **F2** Contact the authors of cited "best tools" lists with updated facts and a request to review your product. Verify: you know which of the top ten cited lists include you.
- [ ] **F3** Complete your G2, Capterra and TrustRadius profiles with the right categories, screenshots and current pricing. Verify: every profile field is filled in and the pricing matches your site.
- [ ] **F4** Ask happy customers for reviews every quarter through a set process owned by customer success. Verify: you record new reviews per platform each quarter.
- [ ] **F5** Answer questions in Reddit and other community threads about your category as a named staff member who states their role. Verify: each reply helps the person asking, even without a link.
- [ ] **F6** Publish YouTube demos and comparisons for your top prompts with clear titles, chapters and full transcripts. Verify: each video description names the product and links to the matching page.
- [ ] **F7** Earn mentions in industry publications, podcasts and partner blogs on the topics in your prompt list. Verify: you log new brand mentions each month.
- [ ] **F8** Keep integration marketplace listings current with the same description you use on your site. Verify: every listing links to a live integration page.

From our own tracking

We track one B2B SEO agency topic in Arrowsterr. It is a small sample next to the public studies above, so read it as a signal.

30
AI answers

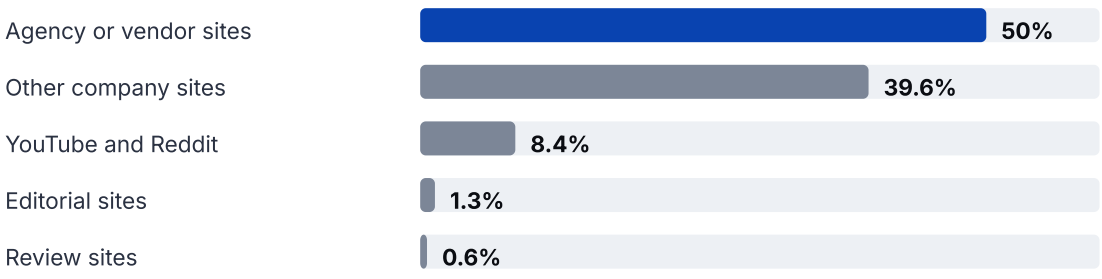
5
buyer prompts

5
AI engines

10 of 24
most cited pages were "best agency" list articles

Source: Perceptric, Arrowsterr data for one B2B SEO agency topic, August to November 2026.

Share of citations by site type



Source: Perceptric, Arrowsterr data for one B2B SEO agency topic, 2026

40%

of AI answers in our sample named the single most visible brand. The next brands appeared in 33% and 27% of answers.

Source: Perceptric, Arrowsterr data. 30 answers from 5 prompts on 5 AI engines, one B2B SEO agency topic, August to November 2026. A small sample.

05

CHAPTER FIVE

Brand signals, authors and measurement

AI tools recommend brands they can describe with confidence. Clear positioning and named experts help them do that, and good measurement shows you which changes paid off.

G. Brand and author signals: 7 checks

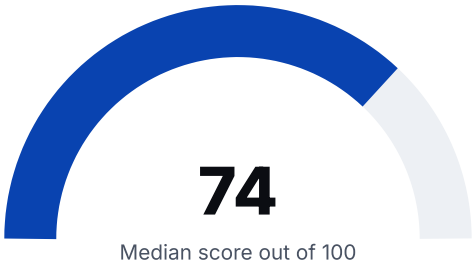
H. Measurement and reporting: 7 checks

How an AI answer turns into pipeline you can see

G. Brand and author signals

7 checks

Sentiment toward brands named in AI answers



Range 65 to 85. Source: Perceptric, Arrowsterr data, 30 answers on one B2B SEO agency topic, 2026

From our own tracking

In our small Arrowsterr sample, answers that named a brand were mostly positive. A score well below your rivals' points to a complaint worth fixing (check G7).

- [ ] **G1** Write one sentence that names your category and your ideal customer, then use it on your homepage and every profile. Verify: the same sentence appears on your site, LinkedIn and review profiles.
- [ ] **G2** Create an author page for every writer with a bio, role, experience and a link to their LinkedIn profile. Verify: no article is published under a generic team byline.
- [ ] **G3** Link every byline to its author page and show the author's role next to their name. Verify: a click on any byline opens the right author page.
- [ ] **G4** Have your founder and subject experts post on LinkedIn every week about the topics in your prompt list. Verify: each expert has posted at least four times in the last month.
- [ ] **G5** Publish customer stories with named companies and specific results, with the customer's written approval. Verify: each story names the company, the problem and a measured result.
- [ ] **G6** Ask each AI tool "What is [your brand]?" and fix any wrong fact at the page where it comes from. Verify: every answer matches your fact sheet from check E5.
- [ ] **G7** Read the sentiment of answers that mention you and address common complaints in your product, docs or support pages. Verify: your tracker shows sentiment by prompt and month.

H. Measurement and reporting

7 checks

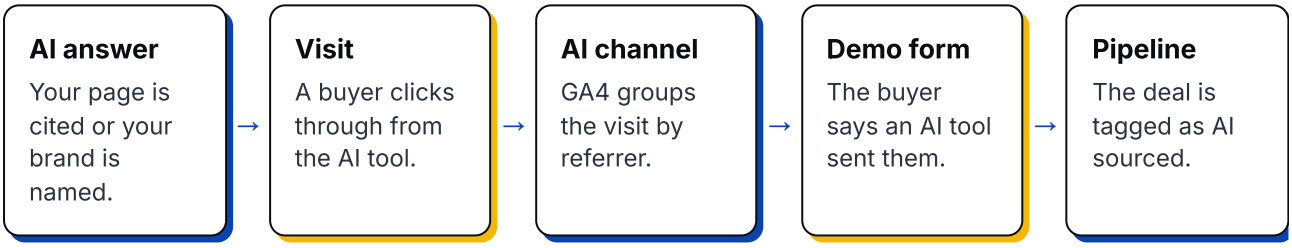
Add these referrer domains to the AI channel group in check H1.

`chatgpt.com` `perplexity.ai` `claude.ai` `gemini.google.com` `copilot.microsoft.com`

- [ ] **H1** Create a custom channel group in Google Analytics 4 for referrals from chatgpt.com, perplexity.ai, claude.ai, gemini.google.com and copilot.microsoft.com. Verify: the AI channel shows sessions in your acquisition report. Method: Seer Interactive

- [ ] H2 Add a landing page report filtered on utm_source=chatgpt.com to catch tagged ChatGPT visits. Verify: the report lists the pages ChatGPT sends people to.
- [ ] H3 Add a free-text "How did you hear about us?" field to your demo form and tag AI answers. Verify: sales can filter demo requests that mention an AI tool.
- [ ] H4 Open the AI Performance report in Bing Webmaster Tools to see Copilot citations and the queries behind them. Verify: you export cited pages each month. Source: Bing, 2026
- [ ] H5 Watch question queries in the Google Search Console Performance report, which includes AI Overviews and AI Mode traffic. Verify: you compare impressions and clicks for these queries each month.
- [ ] H6 Report monthly on visibility, position, sentiment, citation share, AI sessions and AI-sourced pipeline in one view. Verify: leadership gets the same report on the same day each month.
- [ ] H7 Keep a change log that ties each page or outreach change to the prompts it targets and its date. Verify: you can name the change behind each gain in visibility.

How an AI answer becomes pipeline



Your monthly AI search report

Metric	Where it comes from	Last month	This month
Visibility	AI tracker, average of repeated runs (A4, A5)		
Position	AI tracker, by prompt and engine (A4)		
Sentiment	AI tracker, by prompt and month (G7)		
Citation share	Cited domains export (A7)		
AI sessions	GA4 AI channel group (H1, H2)		
AI-sourced pipeline	Demo form answers and your CRM (H3)		

Set up this week

Create the AI channel group (H1) and add the demo form field (H3) now. Both are small changes, and each week without them is a week of AI traffic you can't report on later.

06

CHAPTER SIX

Priority table

Start with the checks that cost little and remove a hard block. Then move to the bigger content and outreach work that builds visibility over months.

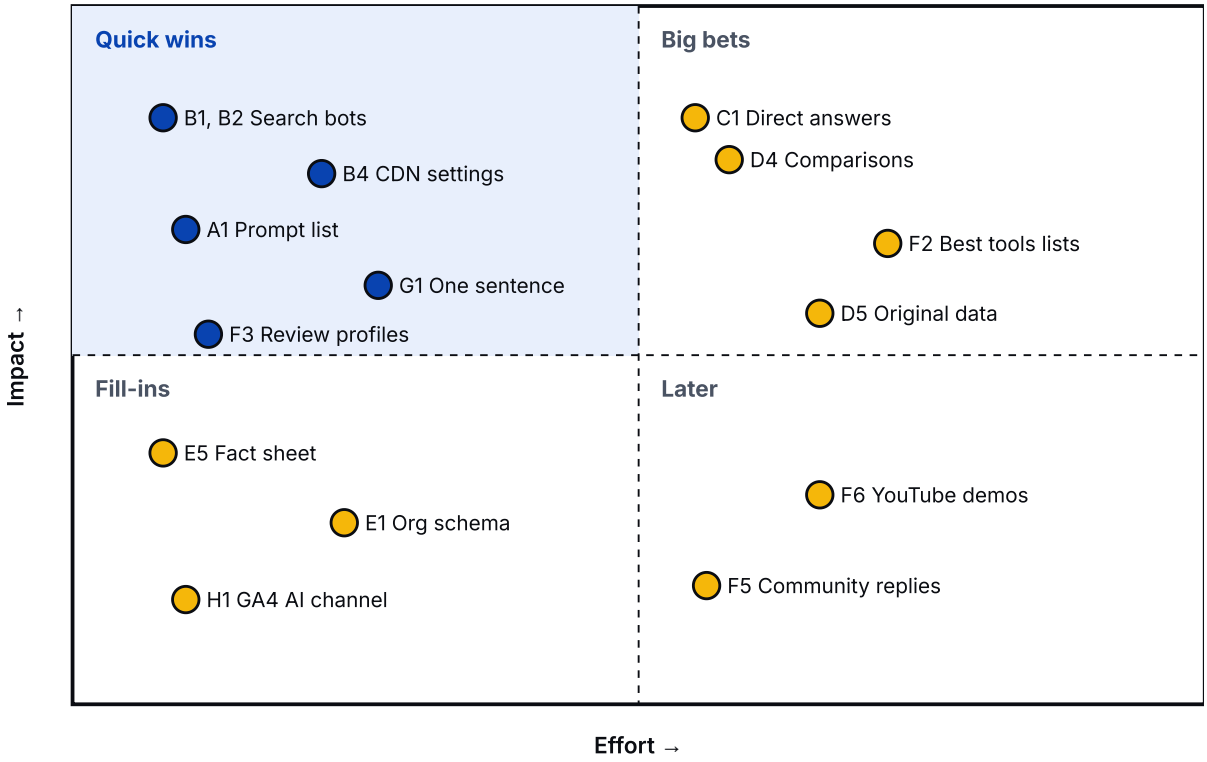
An effort and impact map of the key checks

21 key checks rated by effort and impact

How to pick your first ten

Effort and impact are our own ratings from GEO work with B2B SaaS teams. Adjust them for your site, then put your first ten open checks on this month's plan.

Where the key checks sit



Source: Perceptric ratings

01

Quick wins

Low effort, high impact. Do every open one this month.

02

Big bets

High impact but slower. Start one each month and give it an owner.

03

Fill-ins

Low effort, medium impact. Batch them into a single afternoon.

04

Later

Higher effort, medium impact. Plan them once the quick wins are done.

Check	Action	Effort	Impact
B1, B2	Allow AI search bots in robots.txt	Low	High
B4	Allow AI search bots in your CDN and firewall	Low	High
A1	Write 30 to 50 buyer prompts	Low	High
A6	Save a dated baseline	Low	High
G1	One positioning sentence used everywhere	Low	High
F3	Complete review site profiles	Low	High
E5	Fact sheet matched across profiles	Low	Medium
E1	Organization schema with sameAs links	Low	Medium
H1, H2	Track AI referrals in Google Analytics 4	Low	Medium
H4	Review the Bing AI Performance report	Low	Medium
B6	Key content in the page HTML	Medium	High
C1	Direct answer at the top of key pages	Medium	High
D4	Comparison and alternatives pages	Medium	High
F4	Quarterly review requests	Medium	High
D1, D2	Sourced statistics and named quotes	Medium	High
C6	Quarterly refresh with visible dates	Medium	Medium
F5	Helpful replies in community threads	Medium	Medium
F2	Get onto cited "best tools" lists	High	High
D5	Original data twice a year	High	High
F7	Mentions in publications and podcasts	High	High
F6	YouTube demos and comparisons	High	Medium

Pick your first ten

Take every open quick win first, then add one big bet so longer work starts this month. Write the ten check IDs into your project tool with an owner each.

07

CHAPTER SEVEN

Your monthly GEO routine

GEO pays off through steady monthly work. Give this routine one owner and put each week's tasks on the calendar.

Week by week tasks for one month

A worksheet to start this week

WEEK 1: MEASURE AND CHECK ACCESS

- Export visibility, position, sentiment and cited sources for every prompt and compare them with last month.
- List the prompts where you gained or lost a mention and note the sources each engine cited.
- Recheck robots.txt, CDN bot settings and server logs for AI user agents (checks B1 to B5).

WEEK 2: IMPROVE YOUR OWN PAGES

- Pick the two prompts with the biggest gap and update the pages that should answer them.
- Add a fresh statistic, a named quote or a new table to each updated page, then change its date.
- Run the schema validator on every page you changed this month.

WEEK 3: BUILD MENTIONS ELSEWHERE

- Update your cited domains list and contact the authors of new lists that leave you out.
- Send the month's review requests and post helpful replies in community threads.
- Publish one expert post or video tied to a tracked prompt.

WEEK 4: REPORT AND PLAN

- Send the monthly report with visibility, AI sessions and AI-sourced pipeline next to last month.
- Add this month's changes to the change log and link each one to its prompts.
- Pick next month's checks from the priority table and review the prompt list every quarter.

Start this week

Write your first 30 prompts, open your robots.txt file and save a baseline. Those three checks take an afternoon and show you where to focus next.

Routine owner _____

First 30 prompts written on _____

Robots.txt and CDN checked by _____

Baseline saved on _____

First ten check IDs _____

Monthly report day _____

ABOUT PERCEPTRIC

Want help getting cited in AI answers?

Perceptric is an SEO, GEO and content agency for B2B and SaaS companies. We write source-worthy content, build the third-party mentions AI tools rely on and fix the technical gaps that keep bots out.

We track every prompt in Arrowsterr, the AI search platform we built, so you can see which changes moved your visibility and pipeline.

Book a call

perceptric.com