

AI in Marketing: The Future is *Now*

In 90 days, make your business easy for AI assistants to find, read and describe correctly, and put AI to work inside your business with a person in charge of every promise.

Digital Ingenuity

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BEFORE YOU BEGIN

Read this first

Your customers can now ask an assistant a full question and get one written answer in place of a page of links; Google says AI Overviews alone has more than 2.5 billion monthly users.¹ In this guide's observation, a local answer often names only a few businesses. This guide shows how those answers are built, how to become a business they name and describe correctly, and how to use AI inside your business without letting it make promises for you. Statements about how a platform works are attributed to that platform's own pages, read on September 29, 2026. Where this guide gives its own judgment, it says so.

01	Your goal has changed: be named in the answer, be described correctly, and be easy to call or book.
02	For local and current questions, assistants usually look you up when the question is asked, so being crawlable and indexed still comes first. ^{2, 3, 4}
03	Google says no special file or markup is needed for its AI features; Microsoft recommends schema markup for Copilot. Add markup because it is cheap, not because it wins. ^{2, 5, 6}
04	Assistants learn your facts from your website, your listings and what others publish about you. Make those facts match everywhere. ^{7, 8}
05	Put the answers to customers' real questions in plain text on your site: what you do, where, when, for whom, how pricing works and what happens next.
06	Show proof only you can show: real jobs, real photos, your process. Google says unique, non-commodity content will likely matter more in the long run than any other suggestion in its guide. ²
07	Ask each customer for a review the same way, and reply to what they write. Reviews feed local ranking, and some assistants read them. ^{9, 10}
08	Measure with a fixed set of questions each month, plus the new reports from Google and Bing. ^{11, 12}
09	Use AI to draft, reply fast and summarize, with a named person deciding anything that promises, advises or speaks for a customer.
10	When AI talks to customers, say so at the start, get consent before marketing calls, texts and recordings, and keep customer data in business-grade tools.

Short on time? Take the scorecard at the back first; each line names the chapter that fixes it. Then work the 90 day plan.

INSIDE

Contents

CHAPTER 1	From ten links to one <i>answer</i>		07
1.1	The short list replaced the long list	08	1.4 The new visitors: agents that call and book 09
1.2	Fewer clicks, more decisions made on the page	08	1.5 What did not change 11
1.3	Where the answer comes from	09	
CHAPTER 2	How assistants <i>choose</i> their sources		14
2.1	Retrieve first, then write	15	2.5 Copilot and Bing 16
2.2	Two doors: robots.txt and your security layer	15	2.6 Perplexity and Claude 17
2.3	Google AI Overviews and AI Mode	15	2.7 What nobody documents 17
2.4	ChatGPT	16	
CHAPTER 3	The four <i>pillars</i> : SEO, GEO, AEO and VEO		22
3.1	Four labels, four kinds of question		23
3.2	Where voice gets its facts		24
3.3	What none of them means		25
CHAPTER 4	Make your site easy to <i>read</i>		29
4.1	Let the right crawlers in	30	4.4 Answer the question near the top 31
4.2	Be indexable, with a snippet, and included	31	4.5 Structured data 32
4.3	Put the facts in text	31	4.6 Make booking work for people and agents 33

CHAPTER 5	Be worth <i>citing</i>				38	
	5.1	Commodity versus proof	39	5.4	Reviews: proof in your customers' words	40
	5.2	Proof only you have	39	5.5	Numbers you can stand behind	41
	5.3	Answers from your own phone lines	39	5.6	Pictures, freshness and AI help	41
CHAPTER 6	One business, one set of <i>facts</i>				46	
	6.1	Your business as an entity	47	6.5	Several locations, and changes	48
	6.2	Where your facts come from	47	6.6	Find every place you are listed	48
	6.3	Why matching matters	47	6.7	Trace a wrong answer	50
	6.4	The master fact sheet	48			
CHAPTER 7	Measure what assistants <i>say</i>				54	
	7.1	Why one screenshot proves nothing	55	7.4	The reports that now exist	58
	7.2	Build the question set	55	7.5	Tie it to money	59
	7.3	Run it the same way, every time	56			
CHAPTER 8	AI at work, with a human in <i>charge</i>				64	
	8.1	The rule of the loop	65	8.5	Answering AI callers	67
	8.2	Drafting that sounds like you	65	8.6	Summarizing calls	68
	8.3	Replying to leads fast	66	8.7	Choosing tools	68
	8.4	Answering the phone	66			
CHAPTER 9	Keep these out of AI's <i>hands</i>				73	
	9.1	AI makes mistakes, and you own them	74	9.5	Reviews	75
	9.2	Claims	74	9.6	Review replies and content at scale	75
	9.3	Pricing promises	74	9.7	When AI gets it wrong	79
	9.4	Legal and medical statements	74			

CHAPTER 10	Disclosure, privacy and <i>consent</i>	82
	10.1 The one-sentence disclosure	83
	10.2 The state rules, at a glance	83
	10.3 Calling and texting: consent first	84
	10.4 Data and real consent	85
AT THE BACK	The 90 day plan to become the business assistants recommend	92
	Score yourself	95
	Glossary	97
	Sources	99

36 TOOLS

Tools in this guide

METHOD	The Shortlist Test	Ch 1	12	METHOD	The Monthly Answer Audit	Ch 7	59
☐ CHECKLIST	What did not change	Ch 1	12	☐ CHECKLIST	Tie it to money	Ch 7	61
METHOD	The Three Bins	Ch 2	19	WORKSHEET	Answer audit log	Ch 7	62
☐ CHECKLIST	What nobody documents	Ch 2	20	METHOD	The Ten Call Test	Ch 8	67
METHOD	The Four Layers	Ch 3	25	☐ CHECKLIST	Choosing tools	Ch 8	68
☐ CHECKLIST	What none of them means	Ch 3	27	METHOD	The Four D Loop	Ch 8	69
METHOD	The READ Check	Ch 4	33	WORKSHEET	AI task map	Ch 8	70
WORKSHEET	Page facts sheet	Ch 4	35	☐ CHECKLIST	Choosing tools	Ch 8	71
☐ CHECKLIST	Make booking work for people and agents	Ch 4	36	METHOD	The Traffic Light Sort	Ch 9	76
METHOD	The Question Harvest	Ch 5	40	METHOD	Stop, Correct, Call, Fix, Log	Ch 9	79
METHOD	The Proof Page	Ch 5	42	☐ CHECKLIST	When AI gets it wrong	Ch 9	79
☐ CHECKLIST	Pictures, freshness and AI help	Ch 5	43	WORKSHEET	Your Red list	Ch 9	80
WORKSHEET	Proof Page planner	Ch 5	44	METHOD	Say It, Get It, Guard It	Ch 10	86
METHOD	The Master Sheet Routine	Ch 6	49	WORKSHEET	Disclosure and consent inventory	Ch 10	88
METHOD	Trace, Fix, Recheck	Ch 6	50	☐ CHECKLIST	Data and real consent	Ch 10	89
WORKSHEET	Master fact sheet audit	Ch 6	51	WORKSHEET	One-page staff AI policy	Ch 10	90
☐ CHECKLIST	Trace a wrong answer	Ch 6	52	PLAN	The 90 day plan to become the business assistants recommend	Back	92
WORKSHEET	Question set builder	Ch 7	57	SCORECARD	Score yourself	Back	95

01

IN THIS CHAPTER

PAGES 07 TO 13

1.1	The short list replaced the long list	08
1.2	Fewer clicks, more decisions made on the page	08
1.3	Where the answer comes from	09
1.4	The new visitors: agents that call and book	09
1.5	What did not change	11
METHOD	The Shortlist Test	12
CHECKLIST	What did not change	12

From ten links to one *answer*

A parent asks a phone for a dentist nearby who is open on Saturdays, and reads one written answer. Whether that answer names your practice, and gets it right, now shapes who gets the call. Here is what changed, what did not, and why being specific and checkable matters more than being big.

EXAMPLE

A two-location dental practice in Plano

A parent asks an assistant for a dentist nearby who takes a specific insurance plan and is open on Saturdays. To name this practice, the assistant needs three facts it can find and check: an office nearby, that plan, and Saturday hours.

In this example, the practice lists its insurance plans only in a downloadable PDF, and its Saturday hours appear on the Business Profile for one office but not on the website. The assistant names two other practices whose pages state both facts in plain text. When the parent asks about this practice by name, the assistant says it is closed on weekends.

The fix is three changes: the insurance list in text on each location page, Saturday hours on the website and both profiles, and a booking link that works on a phone. None of it is new technology.

1.1

The short list replaced the long list

Pew Research Center studied the March 2025 browsing of 900 US adults. About 18% of their Google searches produced an AI summary, and searches of ten words or more produced one 53% of the time, against 8% for one or two words.¹³ Google says AI Overviews has more than 2.5 billion monthly active users and that AI Mode, its conversational search, has passed one billion.¹ This guide's reading: the longer and more specific the question, which is how people describe a leak, a toothache or a legal worry, the more likely the reply is a written answer.

1.2

Fewer clicks, more decisions made on the page

Pew also measured what people did next. When a summary appeared, fewer people clicked a regular result, and a link inside the summary itself was clicked on 1% of visits.¹³

8% vs 15%

visits with a click on a regular result, pages with an AI summary versus without, in Pew's March 2025 browsing data

SOURCE 13

Google says clicks from results pages with AI Overviews are “higher quality”, meaning people are more likely to spend more time on the site.⁵ This guide's reading of both: fewer people click, and more of the choosing happens on the answer itself. The answer is where a customer forms a first impression. If it names you, gets your hours right and says you serve their town, you can win the call without winning the click. Count calls and bookings, not only website visits.

1.3

Where the answer comes from

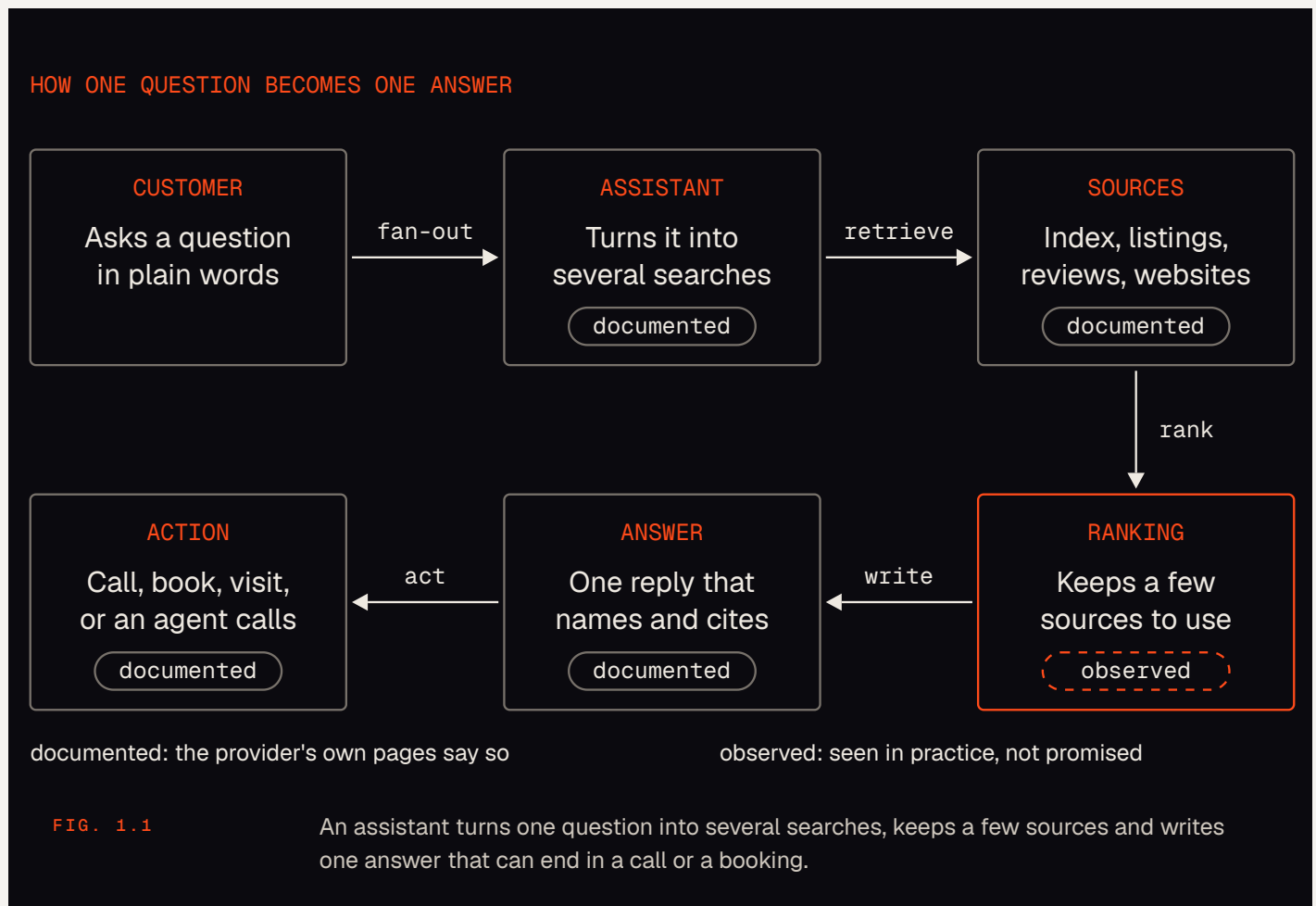
Google, OpenAI and Microsoft describe the same two steps: search, then write. Google's AI features retrieve pages from its Search index and may turn one question into several related searches.^{2, 5} ChatGPT rewrites a question into targeted searches sent to search partners.³ Copilot centers its answer on high-ranking web content.⁴ So the entry ticket has not changed: if ordinary search cannot find and read your pages and listings, no assistant can use them. Chapter 2 has the details.

1.4

The new visitors: agents that call and book

Google says it may place automated calls to your business on a customer's behalf when the customer wants to book an appointment, check a restaurant wait time or confirm the price and availability of a product or service. The calls are recorded, and the feature covers most US states, with a short list of exceptions on Google's page.¹⁴ Google's Gemini app can also call businesses for its user, for now only for eligible

US users on Pixel 11 phones with a Google AI subscription, to ask about hours, availability and quotes or to book. It opens every call by saying it is an AI assistant from Google on a recorded line.¹⁵ Amazon announced in December 2025 that Alexa+ would find local businesses, request quotes and book home services through partner integrations, including Yelp reviews.¹⁰



The trade on those calls is simple. They arrive when someone wants to book, check a wait or confirm a price. You can opt out of Google's calls on the call itself or in your Business Profile settings, and out of Gemini's calls on a separate opt-out page, but opting out may cost you those requests.^{14, 15}

Advertising has arrived too. Google Ads can show ads above and below AI Overviews and, in the US, inside them, though advertisers cannot choose or guarantee the spot inside the Overview.¹⁶ OpenAI began testing labeled ads below ChatGPT answers in the United States on February 9, 2026, says the ads do not influence the answers, and lets businesses sign up for its ads manager where it is available.¹⁷

§ RULE**No one can sell you the answer itself**

Google says there is no way to request or pay for a better local ranking.⁹ OpenAI says placement in ChatGPT is not guaranteed and that advertisers cannot shape, rank or alter its answers.^{3, 17} Google lets ads appear inside AI Overviews but does not let advertisers target or guarantee that spot.¹⁶ Anyone selling a guaranteed place inside an AI answer is promising something Google and OpenAI say they do not offer.

Platform rules and laws in this guide are described as they stood on September 29, 2026. Rules change, so check the linked source before you act. This guide is general information, not legal advice.

1.5

What did not change

Accurate listings, pages a crawler can read, real reviews, a phone that gets answered, and plain answers to real questions. The rest of this guide is those five things, done carefully and checked monthly.

Run this test on each customer question that matters to your revenue.

METHOD

The Shortlist Test

- 01

Ask like a customer. Type or say the question the way a customer would, with your town in it, in a fresh chat.
- 02

Named. Does the assistant name your business at all? If not, you have a visibility problem (Chapters 2 to 5).
- 03

Accurate. Is what it says about you true: services, area, hours, phone, how pricing works? If not, you have a facts problem (Chapter 6).
- 04

Contactable. Could the customer, or an agent acting for them, call, book or get a quote from you right now? If not, you have an operations problem (Chapters 4 and 8).

CHECKLIST

6 ITEMS

- ☐

Ask Google AI Mode, ChatGPT, Gemini, Copilot and Perplexity your most valuable customer question, and note whether you are named.
- ☐

Write down each wrong fact an assistant states about you.
- ☐

Decide, on purpose, whether to accept Google's automated calls, in your Business Profile advanced settings.¹⁴
- ☐

Decide separately whether to opt out of calls from Gemini users.¹⁵
- ☐

Make sure a person, or a clearly disclosed AI, answers your main number during business hours.
- ☐

Write down the three questions customers ask most before they buy.

CHAPTER 1 · IN SHORT

“*If the answer names you and gets your facts right, you can win the call without winning the click.*”

-
- 01 People increasingly read one answer built from a few sources. Be one of those sources.
-
- 02 The answer is built from search, so being found and indexed still comes first.
-
- 03 Agents now call and book for customers. Decide how you answer them.
-

02

IN THIS CHAPTER

PAGES 14 TO 21

2.1	Retrieve first, then write	15
2.2	Two doors: robots.txt and your security layer	15
2.3	Google AI Overviews and AI Mode	15
2.4	ChatGPT	16
2.5	Copilot and Bing	16
2.6	Perplexity and Claude	17
2.7	What nobody documents	17
METHOD	The Three Bins	19
CHECKLIST	What nobody documents	20

How assistants *choose* their sources

Someone asks an assistant about your trade in your town. Before it writes a word, it has to reach your site, and it comes in through doors you control. Here is what each provider documents about those doors, where its documentation stops, and a simple way to sort the advice you will hear.

2.1

Retrieve first, then write

Google calls its method retrieval-augmented generation, or grounding: its core ranking systems pull relevant pages from the Search index, and the AI writes from them, with links.² Microsoft says Copilot grounds answers in web search results when people seek information.⁴ ChatGPT may search the web automatically when a question would benefit from current information.³ So for local and current questions, an assistant usually looks you up when the question is asked. Some answers still come from what a model learned in training, so what is published about you matters either way.

2.2

Two doors: robots.txt and your security layer

robots.txt is a plain text file at the root of your website that tells crawlers, by name, what they may visit. Anyone can read yours: type your web address followed by /robots.txt. A line such as “User-agent: GPTBot” names a crawler, and a “Disallow: /” line under it tells that crawler to stay off the whole site.¹⁸

The second door is your security layer: the settings at your web host or content delivery network, a service that delivers your pages from many locations and filters traffic. It can turn a crawler away before robots.txt is ever read. Google and OpenAI both tell you to check that this layer lets search crawlers through.^{3, 5} A site can say yes in robots.txt and no at the security layer, and nobody notices. Chapter 4 shows the lines to look for.

2.3

Google AI Overviews and AI Mode

To appear as a supporting link, a page must be indexed and eligible to show in Search with a snippet, and the site must be included in Search Console's Search generative AI setting, which is the default. Google says there are no other special optimizations.^{2, 5, 19} AI Overviews and AI

Mode may use different models and show different links, and AI Overviews often do not appear at all.⁵ Business Profile and Merchant Center information can also help your products and services appear in AI responses.²

That setting arrived on August 31, 2026: every site in Search Console now has a Search generative AI control, under Settings.¹⁹ Include is the default. Exclude removes your links and content from AI Overviews, AI Mode and the AI features in Discover, and you get no traffic or impressions from them. A separate token, Google-Extended, limits AI training and does not remove you from these features.^{5, 19}

2.4

ChatGPT

OpenAI says any public website can appear in ChatGPT search if it does not block OpenAI's search crawler, OAI-SearchBot.²⁰ Allow that crawler in robots.txt, and make sure your security layer lets through OpenAI's published search crawler addresses.³ GPTBot is a separate crawler for model training: blocking GPTBot does not remove you from search answers, and blocking OAI-SearchBot does. OpenAI says robots.txt changes take about 24 hours to register. When a person asks ChatGPT to open a page, a user fetcher called ChatGPT-User may visit, and robots.txt rules may not apply to it.²¹

For local questions, ChatGPT may share a general location with third-party providers of nearby business listings, and saved memories or location may influence the results.³ OpenAI does not name those providers, so keep each major listing accurate (Chapter 6).

2.5

Copilot and Bing

Microsoft says experiences like Copilot are powered by Bing's search index,⁶ and that Copilot centers its answers on high-ranking web content, with citations in text and in voice mode.⁴ Bing's standard crawler is Bingbot, written bingbot in robots.txt.²² Bing says it respects

robots.txt and other owner controls, and recommends Bing Places for Business so your address, hours and contact details stay current and eligible for AI answers.⁸

2.6

Perplexity and Claude

Perplexity's search crawler, PerplexityBot, is not used for model training. Its user fetcher, Perplexity-User, generally ignores robots.txt because a person asked for the page, and robots.txt changes can take up to 24 hours to register.²³ Anthropic separates ClaudeBot for training, Claude-SearchBot for search and Claude-User for pages a person asks about. It says blocking either of the last two may reduce your visibility, and that blocking its IP addresses in place of robots.txt may not work reliably.²⁴

TABLE 2.1 5 ROWS

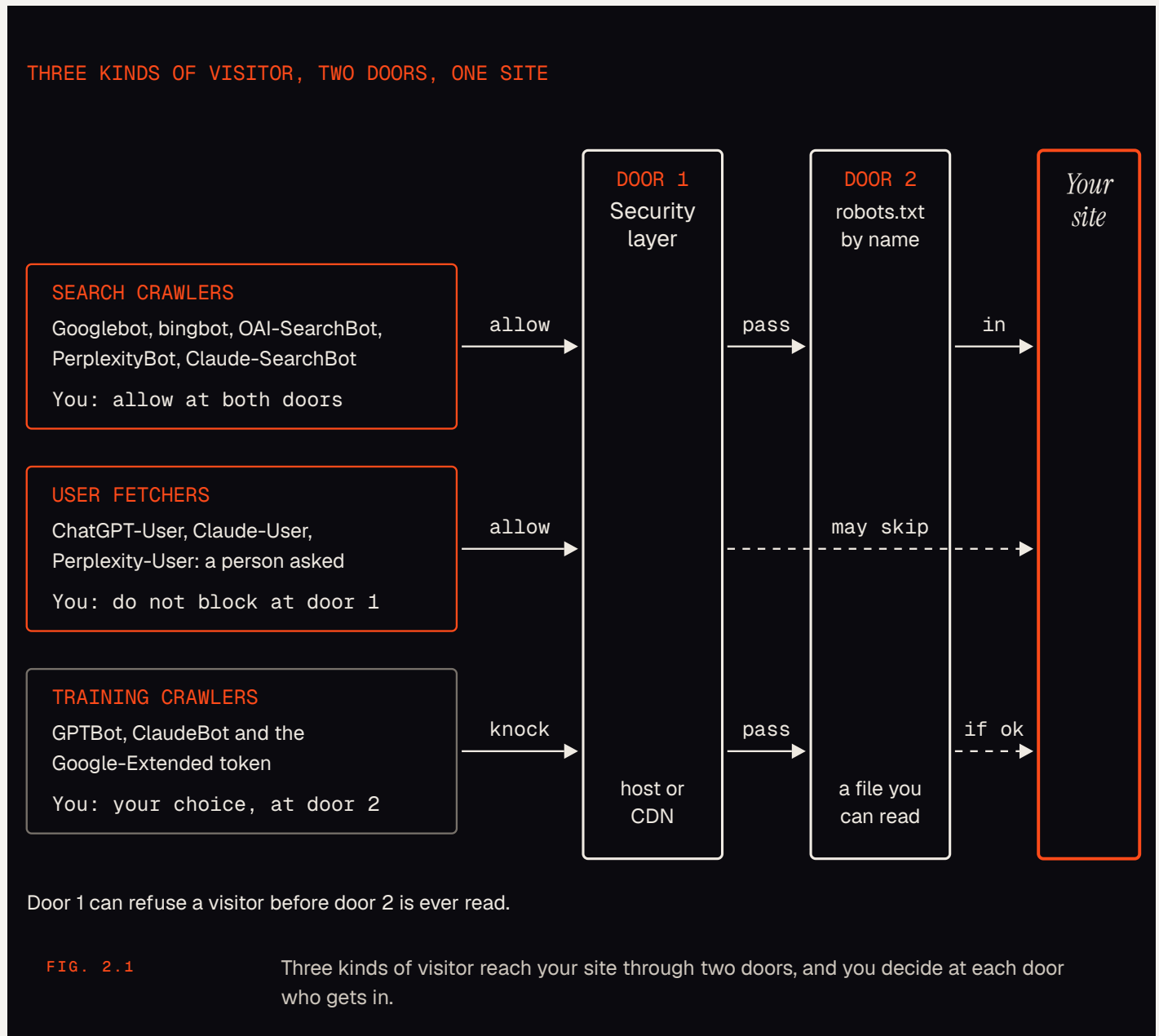
ASSISTANT	SEARCH CRAWLER: ALLOW IT	USER FETCHER: DO NOT BLOCK IT	TRAINING CRAWLER: YOUR CHOICE
Google AI Overviews and AI Mode	Googlebot, plus the Search Console setting ^{5, 19}	Not covered in the pages cited here	Google-Extended token ⁵
ChatGPT	OAI-SearchBot ²¹	ChatGPT-User ²¹	GPTBot ²¹
Copilot	bingbot ²²	Not covered in the pages cited here	Not covered in the pages cited here
Perplexity	PerplexityBot ²³	Perplexity-User ²³	None, Perplexity says ²³
Claude	Claude-SearchBot ²⁴	Claude-User ²⁴	ClaudeBot ²⁴

2.7

What nobody documents

None of the provider pages cited in this guide say which review sites they trust most or whether forum mentions help. Treat claims on those subjects as observation. Pew, for example, found that an online encyclopedia, YouTube and a discussion forum were the most cited

sources in both Google's AI summaries and regular results in its March 2025 sample.¹³ That is a measurement, not a rule, and Google warns that chasing inauthentic mentions is not as helpful as it may seem.² Answers also vary by feature and over time,^{5, 12} so no single screenshot proves anything.



Before you spend a dollar or an hour on an AI visibility tip, file it.

METHOD

The Three Bins

01

Documented. The provider's own help, developer or policy page says it. Act on it.

02

Observed. Someone measured it, or you saw it yourself. Test it small, measure it with the audit in Chapter 7, and keep it only if it works.

03

Rumored. No provider source and no measurement. Ignore it.

§ RULE

What Google says you can ignore

For Google Search, you can ignore llms.txt and other special files, chopping content into chunks, rewriting just for AI, chasing inauthentic mentions and overfocusing on structured data.²

EXAMPLE

A home services company that blocked the wrong bot

In this example, a garage door company's web contractor read that AI companies train on websites and switched on a setting at the site's security layer that blocked "all AI bots". Weeks later the owner noticed that ChatGPT no longer linked to the company's pages.

The fix took an hour. The contractor allowed the search crawlers, OAI-SearchBot, bingbot, PerplexityBot and Claude-SearchBot, in robots.txt and at the security layer, and stopped the security layer from refusing the user fetchers ChatGPT-User, Claude-User and Perplexity-User. The training crawlers stayed blocked because the owner preferred that. Then the contractor confirmed that OpenAI's published addresses were no longer refused.^{3, 21, 23, 24} The lesson: decide about training and search separately. They are different bots with different jobs.

□ CHECKLIST

6 ITEMS

- ☐ Allow Googlebot, bingbot, OAI-SearchBot, PerplexityBot and Claude-SearchBot in robots.txt. ^{21, 22, 23, 24}
- ☐ Make sure your security layer does not block the user fetchers ChatGPT-User, Claude-User and Perplexity-User. ^{21, 23, 24}
- ☐ Decide separately, on purpose, about the training crawlers: GPTBot, ClaudeBot and Google-Extended. ^{5, 21, 24}
- ☐ Ask whoever runs your hosting or security settings whether AI crawlers are blocked by default, and get the answer in writing.
- ☐ In Search Console, open Settings, then Search generative AI, and confirm it is set to include. ¹⁹
- ☐ Verify your site in both Search Console and Bing Webmaster Tools.

CHAPTER 2 · IN SHORT

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- | | |
|----|--|
| 01 | For local and current questions, assistants search, then write. Get found by search first. |
| 02 | Search crawlers, user fetchers and training crawlers are separate. Block training if you like; never block search by accident. |
| 03 | Sort each tip into documented, observed or rumored before you act on it. |
-

NEXT · CHAPTER 3

*The four **pillars**: SEO, GEO, AEO and VEO*

22

03

IN THIS CHAPTER

PAGES 22 TO 28

3.1	Four labels, four kinds of question	23
3.2	Where voice gets its facts	24
3.3	What none of them means	25
METHOD	The Four Layers	25
CHECKLIST	What none of them means	27

The four *pillars*: SEO, GEO, AEO and VEO

Anyone pitching you AI visibility will use four acronyms. Here they are in plain words, with the spoken question behind each one, so you can see what each asks of you and why all four rest on the same work.

3.1

Four labels, four kinds of question

TABLE 3.1 4 ROWS

PILLAR	WHERE IT SHOWS UP	WHAT FEEDS IT	WHAT TO MEASURE
SEO	Google and Bing results, including map results	Crawlable pages, links, reviews, accurate profiles	Search Console and Bing performance reports
AEO	AI answers, answer boxes, spoken replies	Plain question and answer text, facts in text	“Named” and “accurate” in your audit (Chapter 7)
GEO	AI Overviews, AI Mode, ChatGPT, Copilot, Perplexity, Claude	Indexed pages with clear answers and first-hand proof	Search Console Generative AI report, ¹¹ Bing AI Performance, ¹² your monthly audit
VEO	Siri, Gemini, Alexa+, ChatGPT and Copilot voice	Apple Business, Business Profile, Bing Places, review sites, an answered phone	Voice spot checks and call logs

Google describes AEO and GEO as labels used in third-party advice, and asks site owners to check such advice against its official guidance.²⁵ VEO is an industry label too; none of the provider pages cited in this guide define it. The term GEO comes from a 2023 research paper. Its headline result, that certain content changes raised visibility by up to 40%, was measured on the authors' own benchmark of test questions, and results varied by subject.²⁶ Treat it as a research finding, not a forecast for your business.

SEO, search engine optimization. A customer types “emergency plumber Frisco” and scans the results and the map. SEO is being crawled, indexed and ranked there.

AEO, answer engine optimization. A customer asks “why is my water heater making a popping noise?” and wants one direct answer. AEO is being that answer, or the page it cites. It rewards a plain question and a short answer near the top of a page (Chapter 5).

GEO, generative engine optimization. A customer asks “who should I call about my water heater in Frisco, and why?” and gets a written recommendation that names a few businesses. GEO is being named and cited in that answer. It rewards matching facts, proof and reviews (Chapters 5 and 6).

VEO, voice engine optimization. A driver says “Hey Siri, call a plumber near me.” VEO is being the business a voice assistant names, reads out or calls. It rewards accurate listings and a phone that gets answered (Chapter 8).

The monthly audit in Chapter 7 asks one question of each kind, so it measures all four.

3.2

Where voice gets its facts

Each voice assistant names its sources differently. Apple says your place card appears in Maps, Siri, Calendar, Messages and Spotlight, and that you manage it in Apple Business.²⁷ Amazon says Alexa+ will search Yelp's database of local businesses and surface its reviews.¹⁰ ChatGPT can search the web during a voice conversation,³ and Copilot gives citations in voice mode.⁴ So the work is listings first, then pages.

Three changes this year are worth knowing. Apple announced that Apple Business would take over the brand and location tools of Apple Business Connect from April 14, 2026, so confirm what came across.²⁸ Apple now sells ads on Apple Maps to businesses in the US and Canada through Apple Business; they appear in Maps search results and in Suggested Places.²⁹ On phones and tablets, Google announced that from September 4, 2026 most people could no longer use Google Assistant and would use Gemini in its place.³⁰

3.3

What none of them means

For Google, none of the four requires a special file or hidden markup,^{2, 5} and none can be bought as a guaranteed place inside an answer.^{9, 16, 17}

They all reward the same things: pages a crawler can read, facts that match, answers in plain words, proof and reviews.

Build from the bottom. Each layer lifts every pillar that rests on it.

METHOD

The Four Layers

01

Foundation. A crawlable, indexed, fast site, verified in Search Console and Bing Webmaster Tools, plus claimed profiles on Google, Bing and Apple.

02

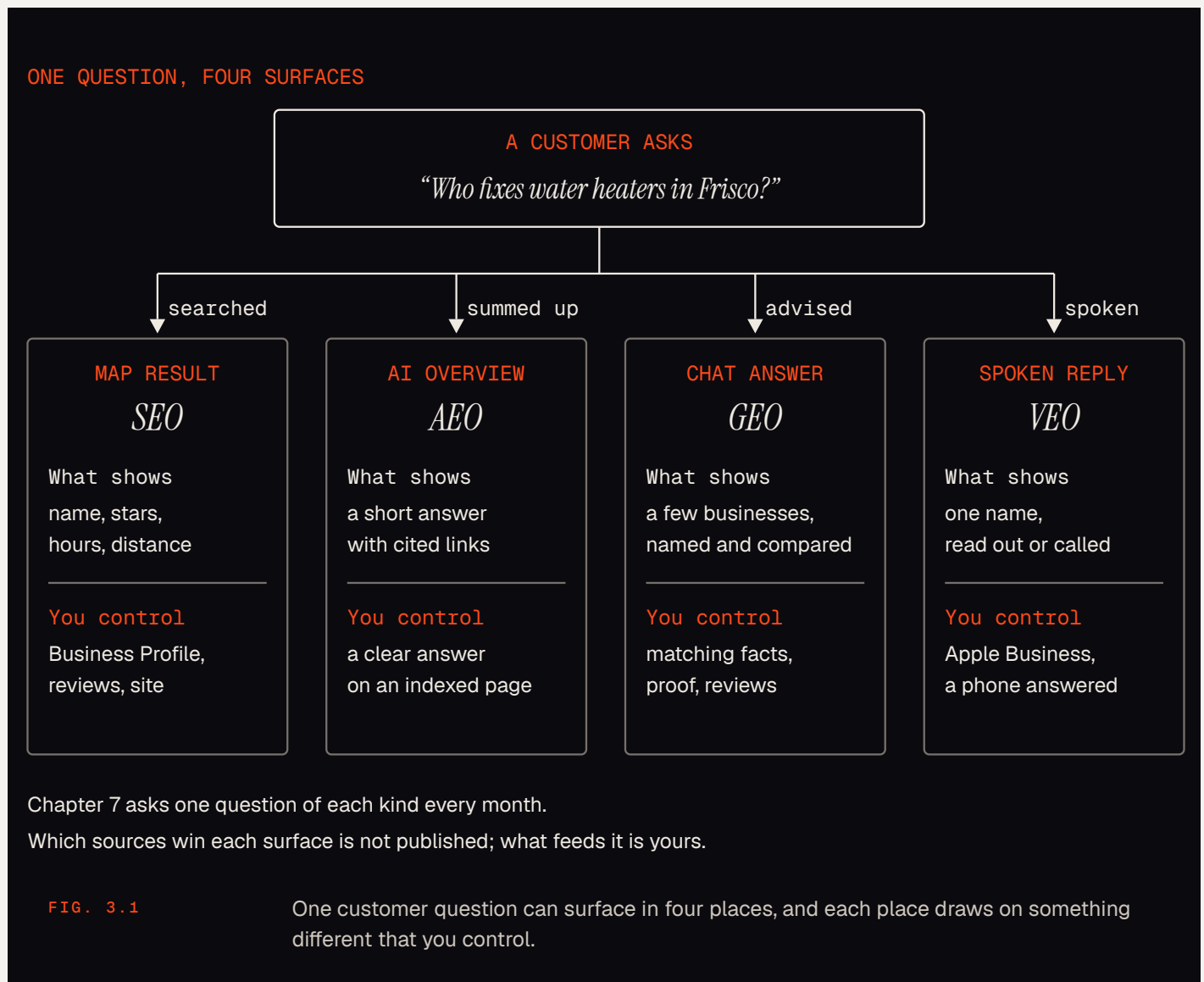
Facts. One set of facts about your business, the same everywhere (Chapter 6).

03

Answers. Pages that answer real customer questions in plain text, with proof and reviews (Chapters 4 and 5).

04

Voice and action. Listings that voice assistants read, a phone that gets answered, and booking that works for people and for agents (Chapters 4 and 8).



EXAMPLE

A family law firm is pitched a GEO package

In this example, a four-attorney family law firm receives a proposal promising “guaranteed placement in ChatGPT and AI Overviews within 60 days”, an llms.txt file, “AI-optimized schema” and 200 suburb pages written by AI.

Run it through the Three Bins. The guarantee contradicts the providers: organic placement is not guaranteed and cannot be bought, and even Google's ads inside AI Overviews cannot be targeted or guaranteed.^{3, 16, 17} The llms.txt file does nothing for Google Search.² Special schema is not

required.⁵ Two hundred near-identical pages risk Google's scaled content abuse policy,² and third-party tools cannot see Google's ranking data or guarantee performance.²⁵ What survives: fixing the firm's profiles, publishing plain answers to the questions clients ask in consultations, and measuring each month. That is a smaller proposal, and a better one. Because this is legal content, the firm also checks its state bar's current guidance on generative AI.

□ CHECKLIST

7 ITEMS

- ☐ Log in to Apple Business and confirm your place card: name, address, hours, phone, website.²⁷
- ☐ Confirm your Business Profile hours, phone and categories.
- ☐ Claim or check your listing in Bing Places for Business.⁸
- ☐ Check your listing on the review site that matters most in your trade.
- ☐ Ask Siri, out loud, one local question about your service, and note who is named.
- ☐ Ask Gemini the same question.
- ☐ Ask Alexa the same question.

CHAPTER 3 · IN SHORT

-
- 01* SEO, GEO, AEO and VEO are labels for one job: being found, used and named.
-
- 02* Voice assistants read listings, so Apple Business, Business Profile, Bing Places and your review sites matter.
-
- 03* Fix the foundation and the facts first. They lift all four.
-

NEXT · CHAPTER 4*Make your site easy to **read*****29**

04

IN THIS CHAPTER

PAGES 29 TO 37

4.1	Let the right crawlers in	30
4.2	Be indexable, with a snippet, and included	31
4.3	Put the facts in text	31
4.4	Answer the question near the top	31
4.5	Structured data	32
4.6	Make booking work for people and agents	33
METHOD	The READ Check	33
WORKSHEET	Page facts sheet	35
CHECKLIST	Make booking work for people and agents	36

Make your site easy to *read*

Your web person asks what, exactly, to change for AI. This is the list the providers actually document, with the myths taken out and the lines to check written out. Most of it is a few settings and edits.

4.1

Let the right crawlers in

Google lists allowing crawling in robots.txt, and by any CDN or hosting infrastructure, as a best practice for its AI features.⁵ OpenAI says your host or content delivery network must allow its search crawler's published addresses.³ That second layer is where sites fail silently: robots.txt says yes while a security setting says no. Ask for both answers in writing, and read your robots.txt against this table. A crawler follows the group that names it; one with no group of its own follows the group marked with an asterisk.¹⁸

TABLE 4.1 6 ROWS

LINES YOU MAY FIND IN ROBOTS.TXT	WHAT THEY DO	WHAT TO DO
User-agent: * Disallow: /	Tells every crawler without a group of its own to stay off the whole site ¹⁸	Remove, unless the whole site is meant to be private
User-agent: OAI-SearchBot Disallow: /	Keeps your pages out of ChatGPT search answers ²¹	Change the second line to Allow: /
User-agent: bingbot Disallow: /	Blocks Bing, whose index powers Copilot ^{6, 22}	Change the second line to Allow: /
User-agent: PerplexityBot Allow: /	Lets Perplexity's search crawler in ²³	Keep
User-agent: GPTBot Disallow: /	Opts out of OpenAI model training; search answers are not affected ²¹	Your choice
User-agent: Google-Extended Disallow: /	Limits use for Google's AI training; you can still appear in AI Overviews and AI Mode ^{5, 19}	Your choice

4.2

Be indexable, with a snippet, and included

Google's rule for its AI features is the rule for Search plus one setting: the page must be indexed and allowed to show a snippet, and the site must be included in the Search generative AI control.^{2, 5, 19} A `noindex` tag, which keeps a page out of the index, or a `nosnippet` setting, which stops Google from showing text from the page, added years ago can quietly keep a page out. The URL Inspection tool in Search Console shows you what Googlebot actually received.⁵

4.3

Put the facts in text

Google asks for important content in textual form.⁵ Microsoft goes further: do not hide key answers in tabs or expandable menus, because AI systems may not render them; do not rely on PDFs for core facts, because they often lack the headings and other signals a web page has; and do not put key information only in images.⁶ Google says it can process content inside JavaScript as long as it is not blocked.² None of the other provider pages cited here say how their crawlers handle it, so a fact that appears only after a script runs is worth checking. Your service area, hours, licenses, accepted insurance and how pricing works belong in plain page text.

4.4

Answer the question near the top

Bing suggests descriptive headings, short sections, tables and FAQ-style content.¹² Google, for its part, does not ask you to break content into chunks or rewrite it for AI.² Both point the same way: write for the customer, put the direct answer first, and use headings that say what follows.

4.5

Structured data

Structured data is code that labels the facts on a page. Google says it is not required for its AI features, though it still makes pages eligible for rich results and must match the visible text.^{2, 5} Microsoft recommends schema markup to help Copilot understand a page.⁶ This guide's conclusion: add it because it is cheap and some systems use it, not because it wins answers. Use Organization markup on your home page with the most specific LocalBusiness subtype that fits, and list your official profiles in the sameAs property.^{31, 32} Do not add FAQ markup to win a rich result: Google stopped showing the FAQ rich result on May 7, 2026.³³

TABLE 4.2 6 ROWS

PROPERTY	WHAT A DENTAL PRACTICE'S HOME PAGE MARKUP SAYS	MUST MATCH
@type	Dentist, one of the LocalBusiness subtypes ³²	What you actually are
name	The public business name	Your sign, profiles and page text
address	Street, city, state and ZIP code	Your Business Profile
telephone	The main number, with the country and area code ³¹	Every listing
url	The home page address	The site itself
sameAs	Links to your official profiles on other sites, such as review and social pages ³¹	Profiles you have claimed

You can also skip llms.txt for Google. Google says Google Search does not use it and that the file neither helps nor hurts visibility; keep one only if another service you care about reads it.^{2, 33}

§ RULE**Do not mass-produce pages**

Creating separate pages for each variation of a search, or for the related searches an AI fans out to, mainly to manipulate rankings or AI answers, violates Google's scaled content abuse policy.² Google has also clarified that its spam policies apply to its generative AI responses.³³ One strong page per real service and real location beats fifty thin ones.

4.6

Make booking work for people and agents

Google points site owners to agent-friendly site practices and says semantic HTML helps other kinds of users parse a page.² OpenAI says its agent in the ChatGPT Atlas browser reads the same labels and roles that screen readers use.²⁰ In practice: real buttons, labeled form fields, your phone number as text, and a booking flow that works without creating an account.

Run four questions on each important page.

METHOD*The READ Check*

01

Reachable. Search crawlers are allowed in robots.txt and at the security layer, the page loads, it is indexable and a snippet is allowed.

02

Evident. Key facts are in the page text, not only in images, PDFs, closed tabs or content that appears only after a script runs.

03

Answer-first. The page answers the customer's question on the first screen, in plain words. This is this guide's judgment, not a provider rule.

04

Declared. Structured data matches what the page says, and sameAs points to your real profiles. Google calls this optional for its AI features; it is cheap, so do it.

HOW A PAGE BECOMES A QUOTED FACT

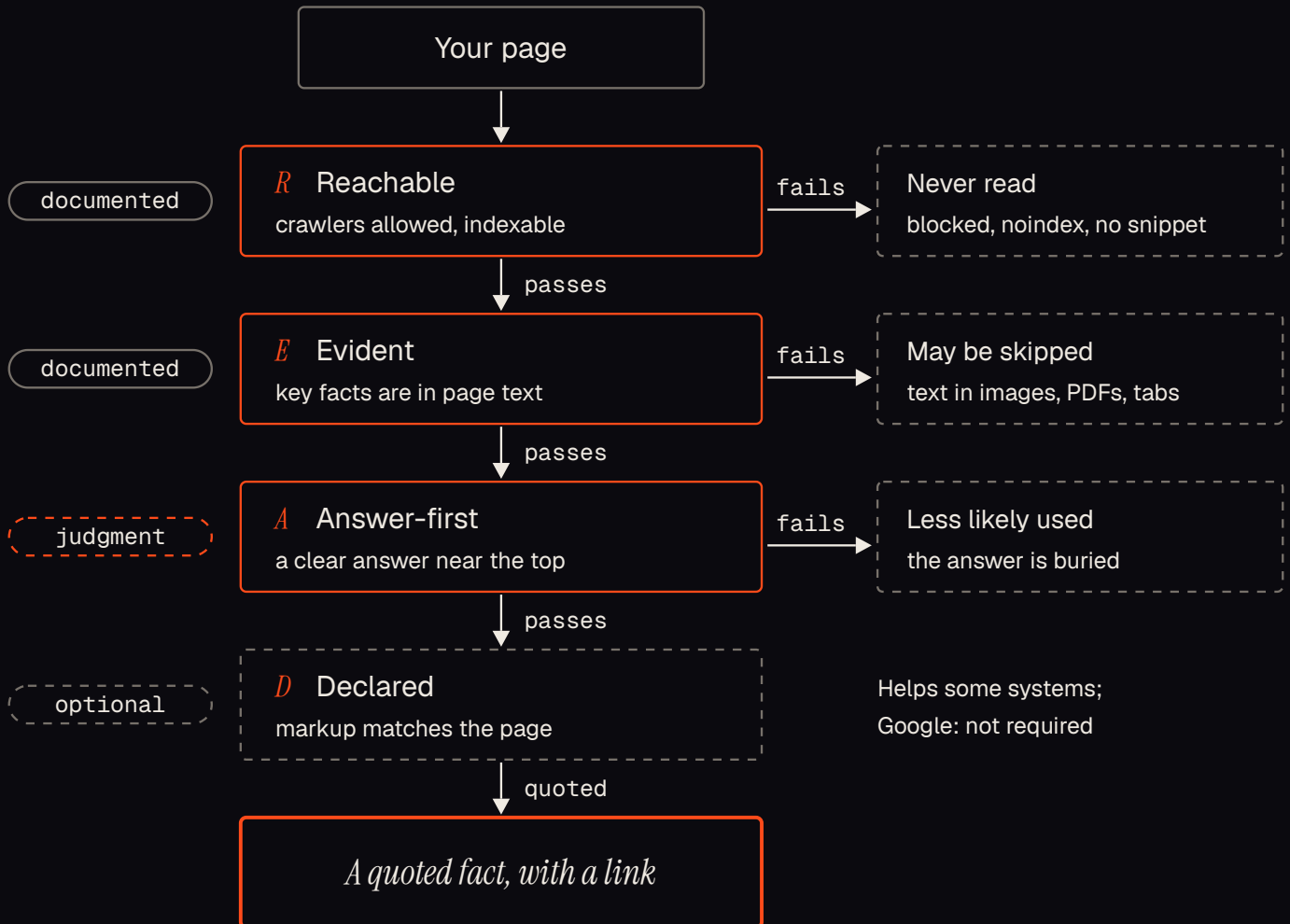


FIG. 4.1

The first two gates are documented by the providers, the third is this guide's judgment, and the fourth helps some systems but Google says it is not required.

Page facts sheet

One row for each important page. The first row is a filled example from the furnace repair page below. Any blank in the middle three columns is a fix for this month.

PAGE AND THE QUESTION IT ANSWERS	THE ANSWER IN ONE SENTENCE	FACTS IN TEXT: AREA, HOURS, PRICE BASIS, LICENSE	PROOF ON THE PAGE	READ RESULT AND DATE
Furnace repair: “Do you repair furnaces near me, and how fast?”	Yes, in the towns listed below, usually the next business day	Town list as a table, hours, diagnostic fee credited to the repair, license number	Captioned photos of real jobs	R, E, A pass; D fixed in week 3

NOTES

EXAMPLE

An HVAC company's furnace repair page, before and after

Before: the page opens with a slider whose headline is baked into images. It says “Call for pricing”. The service area is a PDF map. The only text is general furnace advice that could sit on any site.

After: the first paragraph answers the question customers ask, “Do you repair furnaces near me, and how fast?”, with the towns served and the company's real scheduling promise. A table lists each town served, in text. A short section explains the price basis: a diagnostic fee that is credited to the repair if the customer goes ahead. Photos show real jobs, with captions. The LocalBusiness markup matches the name, phone and address on the page. Nothing here is exotic. The page simply passes all four READ gates.

CHECKLIST

7 ITEMS

- ☐ Open your robots.txt and compare each line with the table in this chapter.
- ☐ Get written confirmation that your hosting and security layer allow search crawlers and user fetchers.³
- ☐ Inspect your ten most important URLs in Search Console.
- ☐ Move any key fact that lives only in an image, PDF or closed tab into page text.
- ☐ Add or fix Organization markup with the right LocalBusiness subtype and sameAs.³¹
- ☐ Remove FAQ markup that was added only to win a rich result.³³
- ☐ Merge or delete thin, near-duplicate city or keyword pages.

CHAPTER 4 · IN SHORT

“*If an assistant cannot read a fact, it cannot repeat it.*”

-
- 01 Reachable, indexable, snippet-eligible and included in Search Console's generative AI setting: that is Google's whole technical rule for its AI features.^{2, 5}
-
- 02 Put facts in text, answers near the top, and markup that matches the page.
-
- 03 Skip the myths: no llms.txt for Google, no FAQ rich results, no page factories.
-

05

IN THIS CHAPTER

PAGES 38 TO 45

5.1	Commodity versus proof	39
5.2	Proof only you have	39
5.3	Answers from your own phone lines	39
5.4	Reviews: proof in your customers' words	40
5.5	Numbers you can stand behind	41
5.6	Pictures, freshness and AI help	41
METHOD	The Question Harvest	40
METHOD	The Proof Page	42
CHECKLIST	Pictures, freshness and AI help	43
WORKSHEET	Proof Page planner	44

Be worth *citing*

Your site can now be read. An assistant still has to choose it over a dozen others that say much the same thing. It needs a reason, and the best reason is something only you can show.

5.1

Commodity versus proof

Google draws the line clearly. A generic list of tips that anyone could write is commodity content. An account of work you actually did, with your own detail, is not. Google says unique, non-commodity content, such as a first-hand take from people who do the work, will likely influence your presence in its generative AI features more in the long run than any other suggestion in its guide.² For a local business, that is good news: you have something no one else has, your own jobs.

5.2

Proof only you have

Photos of your real work, with the town and the problem. Your process, step by step. Your warranty terms. Your licenses and what they cover. What you do when something goes wrong. A competitor cannot copy your jobs, your photos or your process.

5.3

Answers from your own phone lines

The best list of questions to answer is already in your call notes, your inbox, your reviews and your staff's heads. This method takes about 30 minutes, once a quarter.

METHOD

The Question Harvest

01

Collect. Pull the last month of call notes, emails, chat logs, web form messages and review text, and ask whoever answers the phone for the five questions they hear most.

02

Copy the words. Write each question the way the customer said it, not the way you would say it.

03

Sort. Put each one in one of three piles: asked before buying, asked after buying, and asked by people you do not serve.

04

Pick ten. Choose the ten before-buying questions that come up most or lead to the biggest jobs.

05

Assign. Give each question one page, an owner and a date in the planner below. After-buying questions go into your follow-up emails; the third pile tells you what your pages must say you do not do.

5.4

Reviews: proof in your customers' words

Reviews are proof you cannot write yourself, and they count twice.

Google says local results rest mainly on relevance, distance and prominence, that prominence includes how many reviews you have, and that more reviews and positive ratings can help your local ranking.⁹

Assistants read them too: Amazon says Alexa+ will surface Yelp reviews when it finds local home services.¹⁰

The routine that holds up under the rules is simple. Ask each customer once, the same way, at the same moment: when the job is done, whether they seem happy or not. Send the link for the site where you most need reviews. Never offer a reward, never ask only the happy ones and never suggest what to write; the rules are in Chapter 9. Reply to reviews within a time you set, briefly and specifically; replies show

customers you value their feedback.⁹ Once a month, record the count and average rating on each site and the questions reviewers raise, and add those questions to your next harvest.

5.5

Numbers you can stand behind

Microsoft advises anchoring claims in measurable facts instead of vague words,⁶ and Bing suggests supporting claims with evidence.¹² Publish only numbers from your own records, with a date and a plain source (“jobs completed in 2025, from our scheduling system”). A number you cannot show is a claim you cannot defend (Chapter 9).

5.6

Pictures, freshness and AI help

Google suggests supporting your text with high-quality images and video.^{2, 5} Bing says regular updates help AI systems reference current information, and that IndexNow can notify participating search engines when you add, change or remove a page.^{8, 12} Google allows AI assistance in writing when the result meets its standards, and treats mass-produced pages without value as spam.² Let AI help you draft. Let your own proof make the page worth reading.

Build each important page in five parts, in this order.

METHOD

The Proof Page

01

Question. The customer's question, in their words, as the heading.

02

Short answer. Two sentences that answer it directly.

03

Proof. Something only you can show: a real job, a photo, a process step, a credential, a review.

04

Fine print. The limits: when the answer changes, where you do not serve, what costs extra.

05

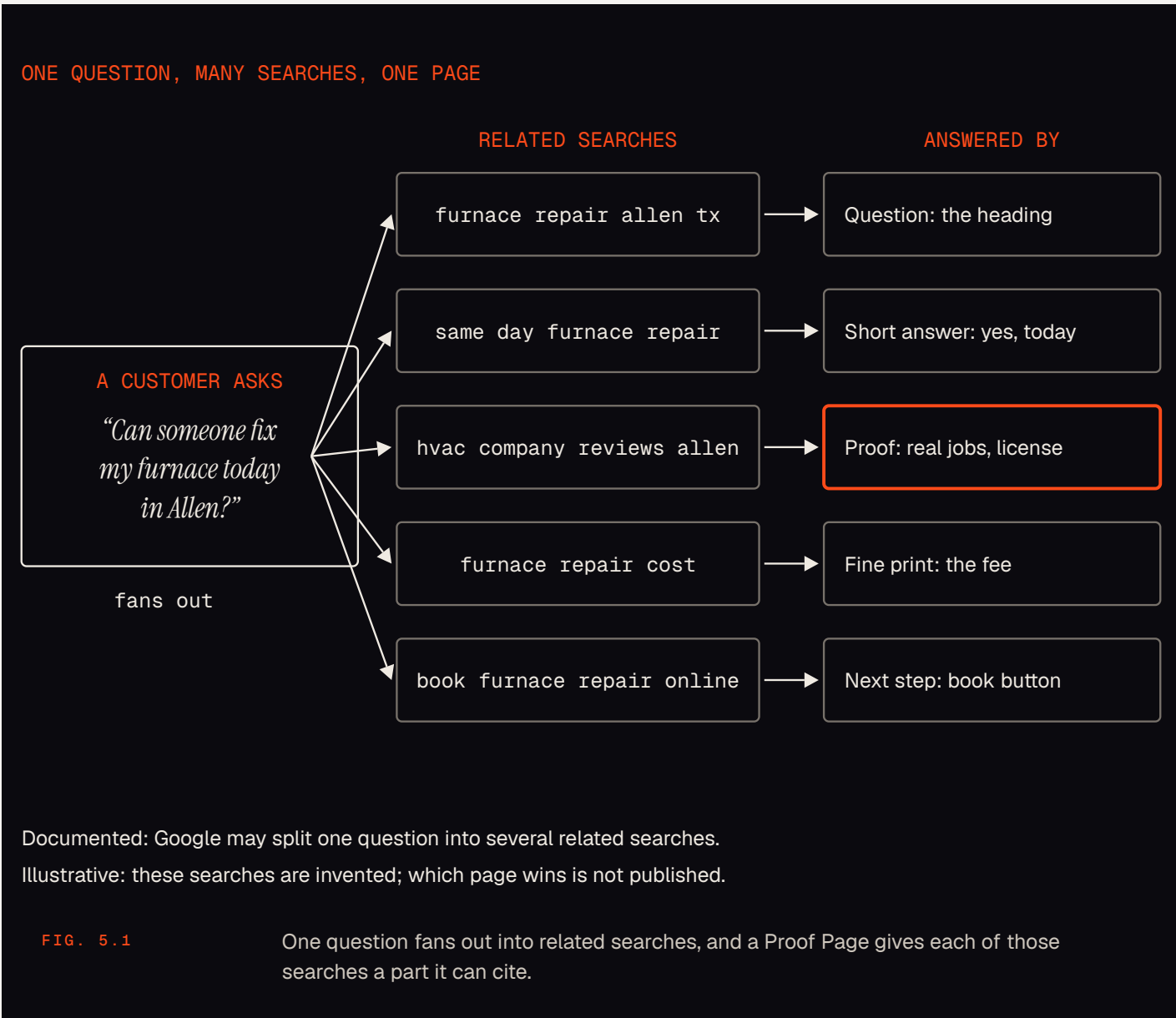
Next step. How to call, book or get a quote, as text and as a real button.

EXAMPLE

A private school's admissions page

Before: "We offer a rigorous, whole-child curriculum in a nurturing environment." It could sit on any school's website.

After: the page is headed "What does a typical day look like for a fourth grader?" The answer: "Fourth graders start at 8:00 with a reading block and finish at 3:15 after a science lab or art." Below it sit the real daily schedule as a table, a photo of a fourth grade science lab taken with parents' permission, the class size policy stated as policy, the fine print (before and after care costs extra and often fills by spring), and a "Book a tour" button. A parent, or an assistant, can now quote something specific. The times and details here are illustrative.



CHECKLIST

6 ITEMS

- ☐ Run the Question Harvest and write down your top ten questions.
- ☐ Pick one service and write its Proof Page this week.
- ☐ Photograph your next five jobs, with the customer's permission.
- ☐ Write one review request and send it, the same way, after each job.
- ☐ Replace each vague claim (“best”, “top rated”) with a fact you can show.
- ☐ Add a “last updated” date to key pages and keep it true.

Proof Page planner

Plan one page per row, starting with the questions from your harvest. The first row is a filled example from the private school below; its times are illustrative.

CUSTOMER QUESTION	TWO-SENTENCE ANSWER	PROOF WE CAN SHOW	FINE PRINT	OWNER AND PUBLISH DATE
“What does a typical day look like for a fourth grader?”	Fourth graders start at 8:00 with a reading block and finish at 3:15 after a science lab or art.	The daily schedule as a table; a lab photo taken with parents' permission	Before and after care cost extra and often fill by spring	Admissions director, by March 1

NOTES

CHAPTER 5 · IN SHORT

“*Your own jobs are the one kind of content no competitor can copy.*”

-
- 01 Google says unique, non-commodity content will likely matter more in the long run than anything else in its guide.
-
- 02 Build pages as Question, Short answer, Proof, Fine print and Next step, from questions your customers actually ask.
-
- 03 Ask each customer for a review the same way; reviews feed local ranking and some assistants read them.
-

06

IN THIS CHAPTER

PAGES 46 TO 53

6.1	Your business as an entity	47
6.2	Where your facts come from	47
6.3	Why matching matters	47
6.4	The master fact sheet	48
6.5	Several locations, and changes	48
6.6	Find every place you are listed	48
6.7	Trace a wrong answer	50

METHOD	The Master Sheet Routine	49
METHOD	Trace, Fix, Recheck	50
WORKSHEET	Master fact sheet audit	51
CHECKLIST	Trace a wrong answer	52

One business, one set of *facts*

An assistant tells a customer you are closed on Saturdays. You are not. It read that somewhere, and it may keep saying it until your sources agree. Here is one system to keep them telling the same truth, and a way to trace a wrong answer back to where it lives.

6.1

Your business as an entity

An entity is one identifiable thing with one set of facts: a name, an address or service area, a phone number, hours, services and owners. Organization markup can help Google understand your business's details and tell it apart from others in search results.³¹ Your job is to make your business easy to recognize as the same thing everywhere it appears.

6.2

Where your facts come from

Google compiles Business Profile information from your website and other public web pages, licensed data from third parties, contributions from users including owners, and its own interactions with your business.⁷ It may call or text the number on your profile to confirm details such as hours or services, and it holds updates from those calls as pending while it reviews them, which can take up to five business days.¹⁴ Microsoft points local businesses to Bing Places,⁸ Apple's place card feeds Siri and Maps,²⁷ and ChatGPT may use third-party business listing providers for local answers.³

6.3

Why matching matters

Businesses with complete and accurate information are more likely to show up in Google's local results.⁹ Bing asks for the same products, entities and concepts to be described consistently across text, images and other media.¹² When your website says one thing and a directory says another, an assistant has to guess, and it may guess wrong.

6.4

The master fact sheet

Write one document that is the truth: public business name, address or service area, main phone, regular and holiday hours, primary category, services, brands you carry, licenses, website, booking link, and the link to each official profile. The owner signs off on it. Every other place your business appears is a mirror of this sheet.

6.5

Several locations, and changes

Give each real, staffed location one verified profile and one page on your website, with its own hours and, where you can, its own local phone number: Google asks for a local number in place of a central call center line whenever possible, and for no more than one profile per location.³⁴ Never list a place you do not staff. Google says a virtual office is not eligible for a Business Profile,³⁴ and a fake location misleads customers and assistants alike. Moves, name changes, new numbers and seasonal hours are when mirrors drift apart, so update the master sheet first and then each mirror on the same day.

6.6

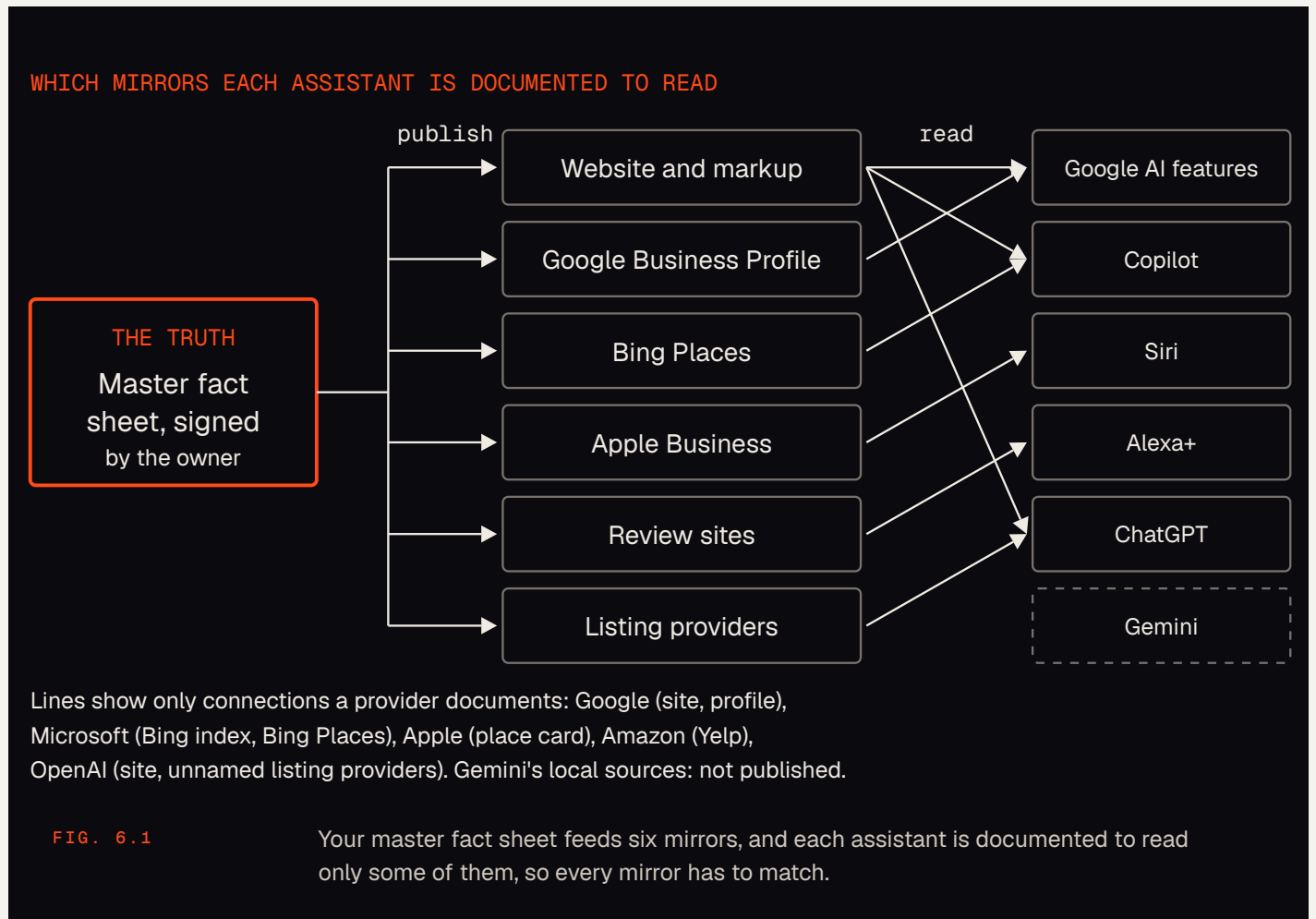
Find every place you are listed

Before you fix anything, find the mirrors you did not know about. Search your main phone number in quotation marks, your street address, and your business name with your town, in one search engine and in two assistants, and ask each assistant where it found its information. Log each listing you find in the worksheet below.

METHOD

The Master Sheet Routine

- 01 **Write the truth once.** Keep it in the master fact sheet, with an owner and a date.
- 02 **Publish it to each mirror.** Website and markup, Google Business Profile, Bing Places, Apple Business, your main review site and your industry directories.
- 03 **Link the mirrors.** List your profile URLs in the sameAs property of your markup³¹ and link to your profiles from your site.
- 04 **Audit each quarter and after each change.** Compare each mirror with the sheet, line by line, and fix it the same day.



6.7

Trace a wrong answer

When an assistant states something false about you, you cannot edit the assistant. You can fix the source it read.

METHOD

Trace, Fix, Recheck

- 01

Ask for sources. In the same chat, ask the assistant where it found the fact.
- 02

Open each one. Read the cited pages and listings, and note which one carries the wrong fact.
- 03

Fix it at the source. Edit your own website or profile. For a Google profile you do not manage, suggest an edit or flag it, as Google's page describes;⁷ for other sites, use their correction form or contact them.
- 04

Fix the sheet. If the wrong fact came from an old version of your own facts, update the master sheet and each mirror.
- 05

Recheck in 30 days. Ask the same question again and log the answer. The 30 days is this guide's choice, because no provider cited here publishes how fast its answers change.

TABLE 6.1 5 ROWS

CHANGE YOU MAKE	HOW LONG IT TAKES, WHERE THE PROVIDER SAYS
A Business Profile update from Google's automated calls	Pending while Google reviews it, up to five business days ¹⁴
A robots.txt change, for ChatGPT search	About 24 hours ²¹
A robots.txt change, for Perplexity	Up to 24 hours ²³
The Search Console generative AI setting	Generally a few days ¹⁹
A fixed fact showing up in assistants' answers	Not published by any provider cited here

Master fact sheet audit

Write the official value first, then check each mirror against it. The hours row is a filled example. Every mirror in the fourth column gets fixed this week.

FACT	OFFICIAL VALUE	MIRRORS THAT MATCH	MIRRORS THAT ARE WRONG	FIXED ON
Example: hours	Monday to Saturday, 7 to 6	Website, Business Profile, Bing Places	Apple place card, an old local directory	June 4
Business name				
Address or service area				
Main phone				
Hours				
Holiday hours				
Primary category				
Top five services				
Website				
Booking link				

EXAMPLE

A restaurant that changed its Monday hours

In this example, a neighborhood restaurant started opening on Mondays in March. The owner updated Google Business Profile the same day. Six weeks later, two assistants still told people it was closed on Mondays.

The owner asked one assistant where it found that, and checked the mirrors. The website footer still said “Closed Mondays”. The main review site and an old local directory showed the old hours, and the Apple place card had never been updated. The fix, in order: the master sheet, the website footer and markup, Apple Business, Bing Places, the review site, then the directory. Then a calendar note to rerun the audit questions (Chapter 7) in 30 days.

CHECKLIST

6 ITEMS

- ☐ Write the master fact sheet and have the owner sign off.
- ☐ Search your phone number, address and name to find each listing.
- ☐ Fix Google Business Profile, Bing Places and Apple Business on the same day.^{8, 27}
- ☐ Add sameAs links to your Organization markup.³¹
- ☐ Decide who answers Google's automated verification calls and texts, and tell them what to expect.¹⁴
- ☐ Put a quarterly mirror audit on the calendar.

CHAPTER 6 · IN SHORT

“*A fact you fixed in one place is still wrong everywhere you did not.*”

-
- 01 Assistants read your mirrors, so each mirror must match.
-
- 02 Write the truth once, publish it everywhere, audit each quarter.
-
- 03 To fix a wrong answer, find the source it came from and fix that.
-

07

IN THIS CHAPTER

PAGES 54 TO 63

7.1	Why one screenshot proves nothing	55
7.2	Build the question set	55
7.3	Run it the same way, every time	56
7.4	The reports that now exist	58
7.5	Tie it to money	59
WORKSHEET	Question set builder	57
METHOD	The Monthly Answer Audit	59
CHECKLIST	Tie it to money	61
WORKSHEET	Answer audit log	62

Measure what assistants *say*

Someone shows you a screenshot: “ChatGPT recommends us.” Or: “It never mentions you.” Neither proves anything. What does is a monthly measurement with a fixed set of questions, fixed conditions, a simple log and the first-party reports that now exist.

7.1

Why one screenshot proves nothing

AI Overviews and AI Mode may use different models and show different links.⁵ Bing says citation counts change with demand, content freshness, model updates and partner refresh cycles.¹² ChatGPT uses an approximate location for local results, and saved memories or location may shape them.³ The same question can get a different answer tomorrow, in another town or in another assistant. Only a repeated, fixed test shows a trend.

7.2

Build the question set

Start with about ten questions on three assistants, which is 30 answers to log, and grow to 20 to 30 questions once the routine runs. Those counts are this guide's guidance, not a platform rule. Use one group for each kind of question in Chapter 3, and write your city into each question, because assistants tailor local answers to location; ChatGPT, for one, uses an approximate location.³

TABLE 7.1 5 ROWS

GROUP	EXAMPLE QUESTION	WHAT IT TESTS
Best or near me	“Who is a good emergency plumber in Frisco?”	Whether you are named (GEO, and SEO on the map)
Problem and fix	“Why is my water heater making a popping noise?”	Whether your pages are cited (AEO)
Compare options	“Tank or tankless water heater for a family of four in Frisco?”	Whether you are cited and described fairly (GEO)
Facts about us	“Is [your business] open on Saturday?”	Whether your facts are right (all four)
By voice	Two of the questions above, asked out loud to Siri or Gemini	Whether a voice assistant names you (VEO)

The same groups work in any trade. “Facts about us” questions look alike everywhere: your hours, your insurance or payment options, your service area.

TABLE 7.2 6 ROWS

TRADE	BEST OR NEAR ME	PROBLEM AND FIX	COMPARE OPTIONS
Family law	“Who is a good divorce lawyer in Plano?”	“How is child support worked out in Texas?”	“Mediation or court for an uncontested divorce?”
Dental	“Dentist near me open Saturdays who takes my insurance?”	“Why does my tooth hurt when I drink something cold?”	“Implant or bridge for one missing tooth?”
Auto repair	“Honest brake shop in McKinney?”	“Why does my car shake when I brake?”	“Dealer or independent shop for a scheduled service?”
Real estate	“Best listing agent for homes in Allen?”	“How long are homes taking to sell in Allen?”	“Flat fee or full service agent to sell my house?”
Restaurant	“Brunch with outdoor seating near downtown Dallas?”	“Which restaurants nearby have gluten free menus?”	“Private dining room for 20 people in Frisco?”
Private school	“Best private elementary schools in Plano?”	“When should we apply for kindergarten?”	“Montessori or traditional for a shy five year old?”

7.3

Run it the same way, every time

Same assistants, same wording, a fresh chat, logged out where you can, with memory and saved location turned off where the assistant allows it, in the same week each month. Record five things for each answer: whether you are named, your position in any list, whether your site is cited, whether the facts are right, and which competitors are named. Budget two to three hours for 30 answers. In this guide's judgment, a tool that runs your question set on a schedule is worth paying for once your log passes about 50 answers a month.

Question set builder

Write ten questions the way customers say them, using the Question Harvest from Chapter 5. Keep only the ones that matter to revenue, then freeze the set for 90 days.

GROUP	QUESTION, IN THE CUSTOMER'S WORDS, WITH YOUR CITY	WHY IT MATTERS TO REVENUE	PILLAR IT TESTS	KEEP FOR 90 DAYS?
Best or near me				
Best or near me				
Best or near me				
Problem and fix				
Problem and fix				
Compare options				
Compare options				
Facts about us				
Facts about us				
By voice				

Then score it. This guide's headline measure is Share of Answer: the answers that name you divided by the questions asked, for each assistant and overall. Track accuracy beside it: of the answers that mention you, the share that get your facts right. Both are this guide's own measures, not platform metrics.

7.4

The reports that now exist

Search Console has a Generative AI performance report. Google says it rolled out to all sites on August 31, 2026, and the same page says not all properties have access yet, so if you cannot see it, look again later.¹¹ It shows impressions of your links in AI Overviews and AI Mode by page, country, device and date. It counts impressions only and does not list the questions people asked, and a site without enough impressions may not see it at all.¹¹ Clicks from AI features are counted inside the ordinary Performance report, under the Web search type, together with your other Search traffic; Google suggests tracking conversions in a tool such as Google Analytics.⁵

Bing Webmaster Tools has an AI Performance report covering Copilot, AI summaries in Bing and select partners.⁸ It shows citations, cited pages and grounding queries, the short phrases the AI used to find your content. Bing stresses that a citation is not a click and that the data is sampled. It is also previewing Citation Share, your share of all citations shown for a grounding query, without naming the other sites, and Intents, which sorts those queries by type, including local.¹² For ChatGPT, OpenAI adds `utm_source=chatgpt.com` to referral links, so those visits show up in your analytics.²⁰

! WARNING

Scores you cannot check

Google says third-party tools, including those promising better AI visibility, do not have access to its ranking data and cannot guarantee performance.²⁵ A tool that runs your question set on a schedule can save time. A tool that claims to know why you are or are not named is guessing.

7.5

Tie it to money

Mentions are a leading sign. Calls, form leads and bookings are the result. Tag AI referral traffic in your analytics, ask each new customer how they found you, and add “an AI assistant” to the list of answers your staff can record.

METHOD

The Monthly Answer Audit

01

Fix the questions. Use the same set each month for at least 90 days.

02

Fix the conditions. Same assistants, same wording, city in the question, fresh chat, memory off, same week.

03

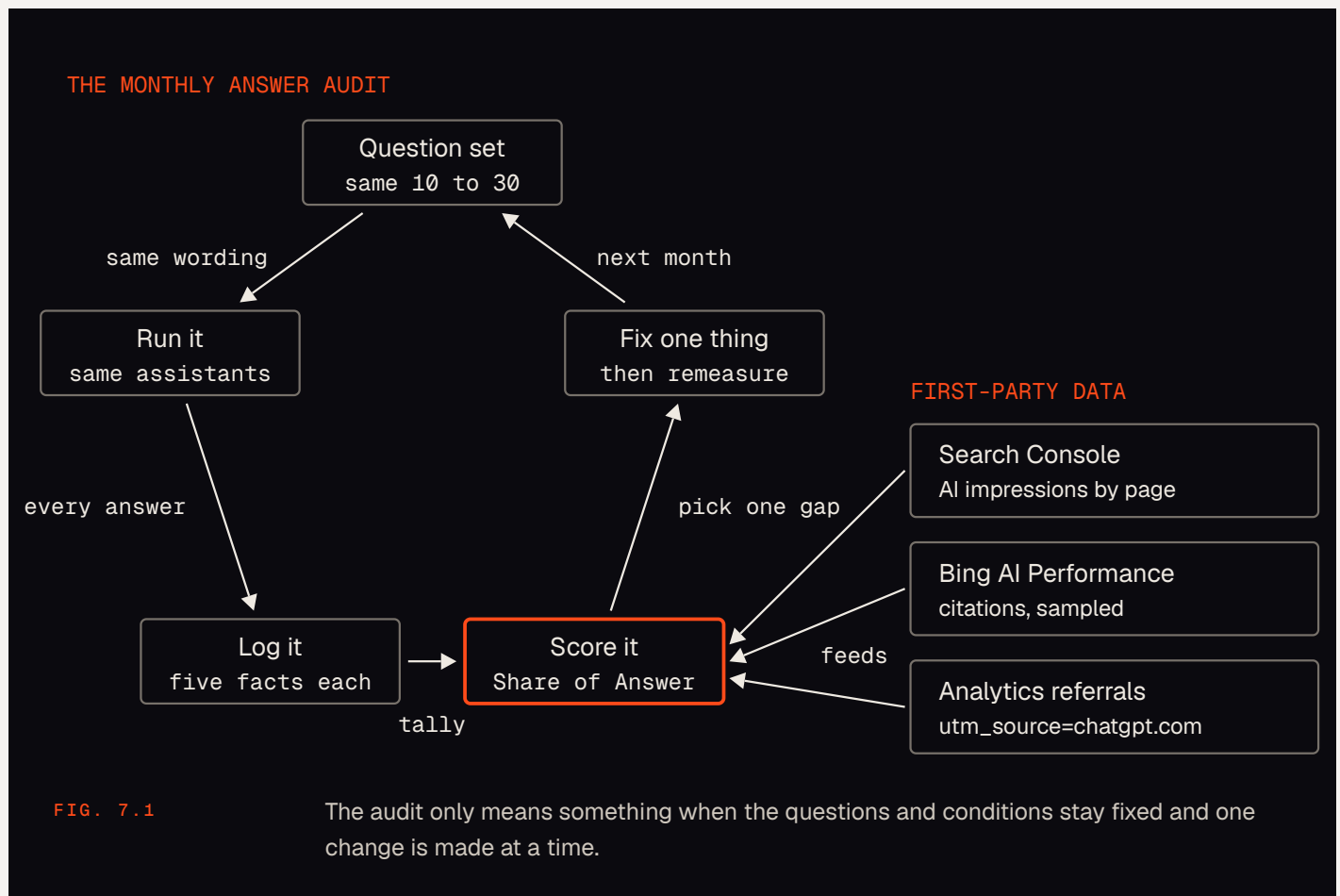
Log five facts per answer. Named, position, cited, facts right, competitors named.

04

Score it. Share of Answer and accuracy, per assistant and overall, beside the first-party reports.

05

Change one thing. Make one fix, write down the date, and judge it at the next audit while the rest of your work goes on.

**EXAMPLE***A roofing company's first three audits*

The numbers in this example are made up to show the method. A roofing company writes 12 questions and runs them on three assistants in the first week of each month.

Month one: its best assistant names the company in 3 of 12 answers, and two answers give the wrong service area. The one change: correct the service area on the website and in Bing Places. Month two: named in 4 of 12, and the service area is now right everywhere. The one change: publish a Proof Page on storm damage inspections. Month three: named in 5 of 12, and the new page shows up as a cited page in Bing's AI Performance report. Share of Answer rose from 25% to 42% in that assistant, and because only one thing changed each month, the owner knows what came before each rise.

☐ CHECKLIST

6 ITEMS

- ☐ Write the question set and freeze it for 90 days.

- ☐ Book a recurring two to three hour slot each month to run it.

- ☐ Turn off memory and saved location in each assistant you test, where it allows.³

- ☐ Open the Search Console Generative AI performance report and export a baseline.¹¹

- ☐ Verify your site in Bing Webmaster Tools and open AI Performance.¹²

- ☐ Create an analytics view for visits tagged utm_source=chatgpt.com.²⁰

Answer audit log

One row per question per assistant. Keep each month's log; the trend is the point.

DATE AND ASSISTANT	QUESTION	NAMED? POSITION?	SITE CITED? FACTS RIGHT?	COMPETITORS NAMED

CHAPTER 7 · IN SHORT

-
- 01 Measure with fixed questions and fixed conditions, each month.
 - 02 Use the Google and Bing reports, and remember that impressions and citations are not clicks.
 - 03 Change one thing at a time so you know what worked.
-

NEXT · CHAPTER 8

AI at work, with a human in charge

64

08

IN THIS CHAPTER

PAGES 64 TO 72

8.1	The rule of the loop	65
8.2	Drafting that sounds like you	65
8.3	Replying to leads fast	66
8.4	Answering the phone	66
8.5	Answering AI callers	67
8.6	Summarizing calls	68
8.7	Choosing tools	68
METHOD	The Ten Call Test	67
CHECKLIST	Choosing tools	68
METHOD	The Four D Loop	69
WORKSHEET	AI task map	70
CHECKLIST	Choosing tools	71

AI at work, with a human in *charge*

A lead arrives at night, a caller wants a price, a review needs a reply. AI can help with all three today, under one rule: AI prepares and a person decides, and where speed matters, AI acts only inside a script a person approved.

8.1

The rule of the loop

AI is fast and tireless, and it is sometimes confidently wrong. OpenAI says search results and citations in ChatGPT can be incomplete, outdated or incorrect,³ and Microsoft says Copilot can make mistakes.⁴ So give AI the repetitive first pass, and keep a named person on each decision that commits the business.

Two kinds of human checkpoint work. For anything new, a person approves each item before it goes out. For things that happen the same way each time, such as acknowledging a lead at night or confirming a booking, a person approves a script once, the AI stays inside it, anything outside it goes to a person, and someone reads a sample every week. Chapter 9 calls these Yellow-draft and Yellow-scripted.

8.2

Drafting that sounds like you

Give the tool your master fact sheet (Chapter 6) and a short voice guide: words you use, words you never use, how you sign off. A person checks each fact and each promise before anything goes out.

TIP

A drafting prompt you can copy

“You write for [business], a [trade] in [town]. Use only the facts in the fact sheet below and match the voice guide below. Never state a price, a date or time we have not confirmed, a guarantee or a result. If you need a fact that is not in the sheet, write [ASK] instead of guessing. End with a section called Questions for the owner that lists each [ASK] and anything you were unsure of. Fact sheet: [paste]. Voice guide: [paste]. Task: [what you need].”

8.3

Replying to leads fast

A fast first reply does not have to promise anything. It acknowledges the request, confirms what was asked, says when a person will follow up and gives your phone number. That makes it a good Yellow-scripted task: approve the wording once, then let it go out at any hour. Set your own speed standard, for example an acknowledgment within five minutes around the clock and a call from a person within two business hours; that is your standard to choose, not a platform rule. Messages that reach you from your Business Profile, which eligible profiles now receive by text, are leads too.³⁵ Texting a lead back needs the right consent (Chapter 10).

TIP

Two first replies you can adapt

Text: “Hi [name], this is the automated assistant for [business]. We got your request about [service]. A team member will call you by [time you set]. If it's urgent, call [number]. Reply STOP to opt out.”

Email: “Thanks for contacting [business] about [service], [name]. A person on our team will reply by [time you set]. To help us prepare, reply with your address and a good time to call. If you need us sooner, call [number]. [Name of the person who will follow up]”

8.4

Answering the phone

An AI receptionist can give hours and directions, book appointments inside rules you set, ask intake questions and sort urgent calls from routine ones. It says it is an AI at the start (Chapter 10) and hands the caller to a person for complaints, pricing exceptions, emergencies and anything legal or medical. Before it takes real calls, test it.

METHOD

The Ten Call Test

01

Place ten calls yourself. An emergency, an angry caller, a price question, a wrong number, a caller who asks for a person, a caller who talks fast, a caller who asks whether it is a robot, a request for a time you are closed, a question it must not answer, and a call on a bad line.

02

Listen to each recording. Mark each call pass or fail: right answer, right handoff, disclosure said, nothing promised.

03

Fix the cause. Change the rule or fact behind each fail, not just the wording.

04

Repeat weekly for a month. Then switch to a weekly sample of real calls, read in the Debrief step of the Four D Loop below.

8.5

Answering AI callers

Some of your callers will now be AI. Google may call to book an appointment or confirm price and availability for a customer, records those calls, and may post updates to your profile from what you say; you can opt out on the call or in your Business Profile settings. Google also says it will never ask for payment, card details or passwords.¹⁴ The Gemini app can call for its user, announces itself as an AI assistant from Google on a recorded line, and says it cannot be used to sell products or services or to relay sensitive information such as financial or health details.¹⁵ Brief your staff to answer these callers accurately and never give out payment or account details.

8.6

Summarizing calls

Call summaries save time and catch details a busy person misses.

Decide three things before you turn them on: where each summary goes (the customer record, not a personal inbox), who reads it, and by when.

Recording is a legal question: California, for example, prohibits recording a confidential phone call without the consent of all parties.³⁶ Announce recording at the start of each recorded call.

8.7

Choosing tools

Before you buy, check four things.

□ CHECKLIST

4 ITEMS

- ☐ Use a business plan, not a personal account; OpenAI, for example, says it does not train its models on data from its business plans and API by default.³⁷
- ☐ If you are a health care provider covered by HIPAA, sign a business associate agreement before any vendor creates, receives, stores or transmits patient information for you; HHS lists an AI chatbot that schedules appointments on a provider's patient portal as an example of a business associate.³⁸
- ☐ Confirm you can export your data if you leave.
- ☐ Confirm the tool can pass a conversation to a person.

! WARNING

Never paste these into an AI tool

Card numbers and bank details, government ID numbers such as Social Security numbers, passwords and login codes, patient information without a signed agreement, and anyone's private details that the task does not need.

METHOD

The Four D Loop

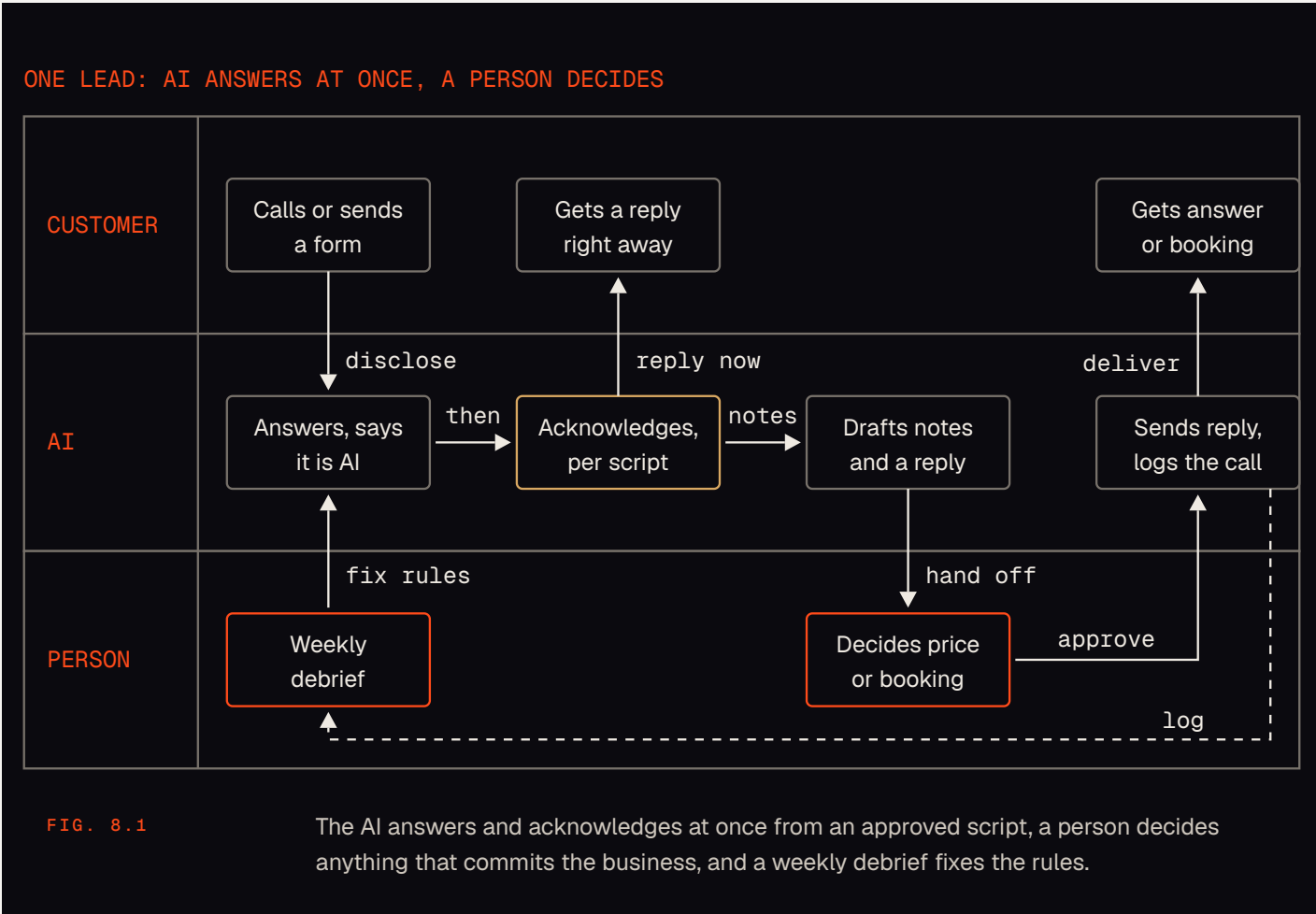
- 01

Draft. AI prepares the reply, post, summary or answer.
- 02

Decide. A named person approves anything new that promises, advises or speaks for a customer, and approves once each script the AI may run on its own.
- 03

Deliver. The approved message or script goes out, with an AI disclosure wherever AI is talking; anything outside a script goes to a person.
- 04

Debrief. Once a week, review a sample of AI output and fix the prompt, fact or rule behind each mistake.



AI task map

List each task where AI touches your business. If a customer-facing task has no human checkpoint, fix that first.

TASK	WHAT AI DOES: DRAFT, ANSWER OR SUMMARIZE	CHECKPOINT: EACH ITEM, OR A SCRIPT APPROVED ONCE	CUSTOMER DATA TOUCHED	OWNER

NOTES

EXAMPLE

A three truck plumbing company in Frisco sets up after-hours answering

The greeting: “Thanks for calling. I’m the company’s AI assistant, and this call is recorded. I can book a visit or reach the plumber on call. How can I help?”

Three intake questions: what is happening, the service address and a callback number. The emergency rule: an active leak or no water goes straight to a live transfer to the on-call plumber. For a caller who smells gas, the AI reads, word for word, a safety line the owner wrote from the gas utility’s own guidance, then transfers the call. What the AI must never say: a price, a guaranteed arrival time or a diagnosis. It books visits only into open slots on the owner’s calendar, inside a script the owner approved once. At 7:30 each morning, the office manager reads each overnight summary, confirms the bookings and calls back anyone the AI could not help.

CHECKLIST

5 ITEMS

- ☐ Name one owner for AI use in the business.
- ☐ Write the phone handoff rules: what AI answers, what goes to a person, and how fast.
- ☐ Run the Ten Call Test before your AI receptionist takes real calls.
- ☐ Add a recording notice to each recorded line.³⁶
- ☐ Brief staff on automated calls from Google and other AI assistants.^{14, 15}

CHAPTER 8 · IN SHORT

“*AI prepares. A person decides.
Then it goes out.*”

-
- 01 AI drafts and a named person decides; for routine replies, a person approves the script once and reads a sample each week.
-
- 02 Give AI the repetitive work; keep people on promises, prices and advice.
-
- 03 Expect AI callers, and answer them as carefully as people.
-

09

IN THIS CHAPTER

PAGES 73 TO 81

9.1	AI makes mistakes, and you own them	74
9.2	Claims	74
9.3	Pricing promises	74
9.4	Legal and medical statements	74
9.5	Reviews	75
9.6	Review replies and content at scale	75
9.7	When AI gets it wrong	79
METHOD	The Traffic Light Sort	76
METHOD	Stop, Correct, Call, Fix, Log	79
CHECKLIST	When AI gets it wrong	79
WORKSHEET	Your Red list	80

Keep these out of AI's *hands*

The chat on your site quotes a price you never set. A tool offers to write reviews “from customers”. Some work should never be left to AI alone. Here is each kind, the rule behind it, a sort for everything else, and what to do when AI gets it wrong anyway.

9.1

AI makes mistakes, and you own them

The providers say so themselves.³, ⁴ When AI writes on your site, in your chat or on your phone line, the words are yours. Customers and regulators will not care which tool typed them.

9.2

Claims

Each number and each superlative needs proof you can show. A May 2026 Federal Trade Commission case is a warning to buyers and sellers of AI marketing alike.³⁹ The FTC alleged that a media company and two marketing firms told small businesses their AI service could target ads using conversations overheard by smart devices, and that consumers had opted in; according to the FTC, the service used no voice data and consumers had not opted in.³⁹ Ask any AI vendor to show you how its product works, and never repeat a claim about it that you cannot check. The same goes for images: an AI-made picture presented as your real work shows work you did not do.

9.3

Pricing promises

AI may explain how your pricing works: the diagnostic fee, what changes a quote, what is included. It must not quote a binding price, a discount or a guarantee. Those belong to a person.

9.4

Legal and medical statements

AI must not give legal, medical or financial advice, or present itself as a licensed professional. Several states now regulate AI in professional settings: Utah and Texas require disclosure when AI is used in regulated or health care services, California requires a notice on AI-written clinical messages, and from 2027 Colorado bars general-purpose chatbots from

presenting their output as a licensed professional's.^{40, 41, 42, 43} The table in Chapter 10 shows who each law covers. Law firms should also check their state bar's current guidance on generative AI.

9.5

Reviews

§ RULE**Reviews come from customers, not from you or your AI**

The FTC's rule on consumer reviews makes it unlawful to write, buy or sell reviews or testimonials that misrepresent that the reviewer exists or had real experience with you, or to offer rewards for reviews that must be positive or negative.⁴⁴ An owner or manager who reviews the business must clearly disclose the relationship, and managers must not ask staff or family for reviews that hide it.⁴⁴ Google Maps removes incentivized reviews, bans asking only happy customers, and says businesses should not request specific content, including naming a staff member.⁴⁵

So the old tip “ask customers to mention the service and the city” breaks Google's policy. Ask everyone, the same way, and let them write what they want.

9.6

Review replies and content at scale

AI may draft replies to positive and neutral reviews, and a person approves each one before it posts. A reply to an unhappy customer is Red: the owner writes it. The same caution applies to pages: Google treats mass-produced pages without value as scaled content abuse, and its spam policies cover its AI answers too.^{2, 33}

METHOD

The Traffic Light Sort

01

Green: AI alone. Internal summaries, first drafts for staff, reformatting, translations for internal use.

02

Yellow-draft: a person approves each item. Posts, emails, web copy, replies to positive reviews, and any customer message that is not in a script.

03

Yellow-scripted: a person approves the script once. Lead acknowledgments, booking confirmations and after-hours answers that stay inside approved wording. Anything outside the script goes to a person, and someone reads a sample every week.

04

Red: people only. Prices and guarantees; legal, medical or financial advice; anything written as a customer, such as reviews and testimonials; replies to upset customers.

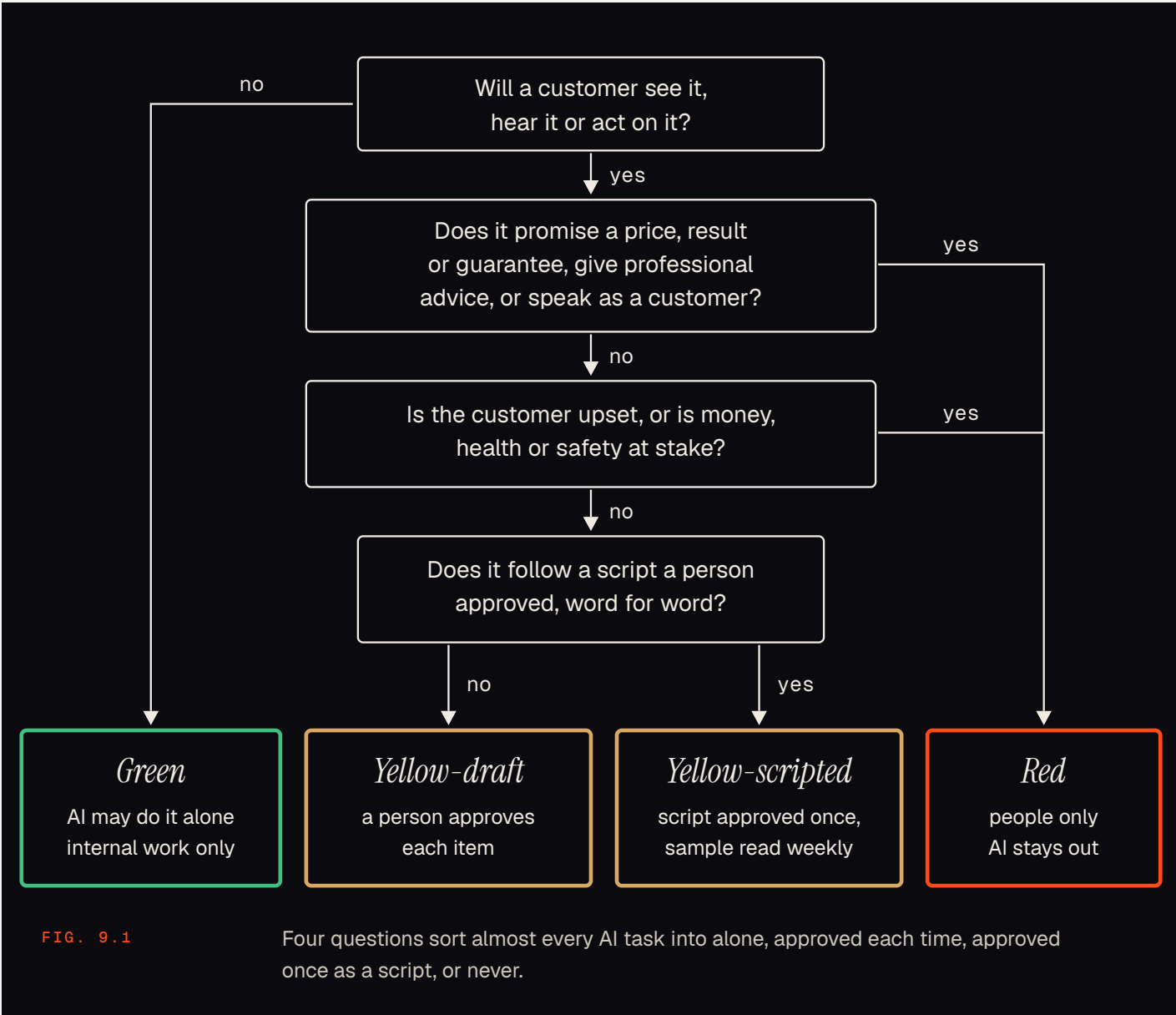


TABLE 9.1 10 ROWS

TASK	COLOR	WHY	WHO APPROVES
After-hours lead acknowledgment	Yellow-scripted	Speaks to a customer, in approved wording	Owner approves the script once; a sample is read weekly
A quote for a job	Red	Commits the business to a price	Estimator or owner
Reply to a one-star review	Red	An upset customer, in public	Owner writes it

TASK	COLOR	WHY	WHO APPROVES
Reply to a five-star review	Yellow-draft	Public, but low risk	Owner or marketing lead
Writing a review for a customer	Red, never	Unlawful and against platform policy ^{44, 45}	No one
An AI-made testimonial, or a photo of a “customer” who does not exist	Red, never	A testimonial must reflect a real customer's real experience ⁴⁴	No one
An AI-made picture shown as your real work	Red, never	It shows work you did not do	No one
Summarizing a call for your records	Green	Internal only	Spot-checked in the weekly debrief
A patient's question about symptoms	Red	Clinical advice	Licensed staff
Social post about a finished job	Yellow-draft	A public claim about your work	Marketing lead

EXAMPLE

A med spa's website chat quoted a price that did not exist

In this example, a med spa's chat assistant had been loaded with an old price sheet. A visitor asked what a treatment cost, and the chat named a price from two years earlier and called it “our current special”. The visitor booked and was upset at the consultation.

The fix: the chat now answers price questions with how pricing works (“pricing depends on the area treated and is confirmed at your consultation”) and a booking link. Each price lives on one page the owner updates. And a new Red rule went on the list: “The chat never states a price or a special.”

9.7

When AI gets it wrong

It will, sooner or later. Decide the response now, so nobody improvises.

METHOD

Stop, Correct, Call, Fix, Log

- 01

Stop. Pause the chat, script or template that said it.
- 02

Correct. Remove or fix what was published or sent.
- 03

Call. A person contacts the customer, says plainly what was wrong and what is true, and puts it right.
- 04

Fix. Change the fact, prompt or rule behind the mistake, and add a Red rule if it belongs there.
- 05

Log. Record what happened and what changed, for the weekly debrief.

CHECKLIST

5 ITEMS

- ☐ Share the Traffic Light list with each staff member who uses AI.
- ☐ Remove any AI-written text that states a price, guarantee or outcome you have not approved.
- ☐ Stop any review request that offers a reward, filters for happy customers or asks for specific words.⁴⁴, ⁴⁵
- ☐ Have a licensed professional approve health, legal and financial copy.
- ☐ Keep a log of AI mistakes found in the weekly debrief.

Your Red list

Write down each task that is people only in your business, and put each rule into the AI's instructions.

TASK THAT STAYS WITH PEOPLE	WHY IT IS RED	WHO DOES IT	ADDED TO THE AI'S RULES ON

NOTES

CHAPTER 9 · IN SHORT

“*You own every word your AI says, whichever tool typed it.*”

01

AI can be wrong, and its words are your words.

02

Red means people only: prices, professional advice, upset customers and anything written as a customer.

03

Yellow means a person approves each item, or approves a script once and reads a sample each week.

10

IN THIS CHAPTER

PAGES 82 TO 91

10.1	The one-sentence disclosure	83
10.2	The state rules, at a glance	83
10.3	Calling and texting: consent first	84
10.4	Data and real consent	85
METHOD	Say It, Get It, Guard It	86
WORKSHEET	Disclosure and consent inventory	88
CHECKLIST	Data and real consent	89
WORKSHEET	One-page staff AI policy	90

Disclosure, privacy and *consent*

Your AI answers a call, sends a text, keeps a note. Three things decide whether that builds trust or creates risk: telling people it is AI, getting permission before you call, text or record, and guarding their data. The rules are a patchwork that is still changing, so here is one standard that holds up across it.

10.1

The one-sentence disclosure

Say it at the start, in the same channel, in plain words, and offer a person. Google's own Gemini calls open by saying they are an AI assistant from Google on a recorded line,¹⁵ which is a sensible standard for your business too.

TIP

Three disclosure lines you can use today

Chat: “Hi, I'm the AI assistant for [business]. I can answer questions and book appointments. Type ‘person’ at any time to reach our team.”

Phone: “Thanks for calling [business]. I'm an AI assistant, and this call is recorded. Say ‘person’ at any time to reach our staff.”

Text: “This is the automated assistant for [business]. Reply HELP to reach a person or STOP to opt out.”

10.2

The state rules, at a glance

TABLE 10.1 6 ROWS

WHERE	WHO IT COVERS	WHAT IT REQUIRES	IN FORCE
California, bots	Anyone using a bot to talk with people in California online	Do not mislead people about being a bot to push a sale; a clear, conspicuous disclosure is the safe harbor ⁴⁶	Since July 1, 2019
Utah	Businesses using generative AI with consumers; regulated occupations	Disclose AI when a consumer clearly asks; regulated occupations disclose up front in high-risk interactions ⁴⁰	Since May 7, 2025
Maine	Anyone using an AI chatbot in trade with consumers, in text or by voice	Tell consumers clearly they are not dealing with a human if they could reasonably think they are ⁴⁷	Enacted in 2025

WHERE	WHO IT COVERS	WHAT IT REQUIRES	IN FORCE
Colorado	Operators of general-purpose conversational AI open to the public; customer service and transaction tools, internal tools and HIPAA covered entities are excluded	Say it is AI at the start of the first chat each day and every three hours or with a lasting notice; never present its output as a licensed professional's ⁴³	From January 1, 2027
Texas	Government agencies, and health care providers using AI in care	Agencies disclose AI before or at the time of the interaction; providers tell the patient by the time care is first provided ⁴¹	Since January 1, 2026
California, health care	Health facilities, clinics, physician offices and physician group practices	A notice when generative AI writes patient clinical messages, unless a licensed provider reviewed them ^{42, 48}	Since January 1, 2025

Colorado's law is aimed at general-purpose chatbots, so a typical business chat line is likely outside it; ask your lawyer whether your tool counts. A December 2025 executive order directs the Justice Department to challenge some state AI laws, but until a court or Congress acts, these state laws still apply.⁴⁹ Rules change often. Check the current text on your state legislature's site before relying on this table, and ask your lawyer how it applies to you.

10.3

Calling and texting: consent first

The FCC has confirmed that AI-generated voices count as an “artificial voice” under the Telephone Consumer Protection Act, so calls that use them need the called person's prior express consent.⁵⁰ Telemarketing calls made with an artificial or prerecorded voice to a home or cell phone, or with an autodialer to a cell phone, need prior express written consent, with narrow exceptions.⁵¹ Each artificial or prerecorded voice message must also state your business's name at the start and give a phone number, and telemarketing messages must offer an automated way to opt out.⁵¹ The FCC's rules treat texts as calls, so get written consent before marketing texts too; it is the safe standard, and some states require more.⁵¹

Those rules are about calls you place. An AI that answers calls customers make to you is a different situation. It should still say it is AI: Maine, for one, requires a clear notice whenever a caller could reasonably think they are talking to a human, and Utah requires an answer when a caller asks.^{40, 47} If the call is recorded, it also needs a recording notice.³⁶

§ RULE**Honor each clear opt-out**

Under the FCC's current rule, a customer can take back consent by any reasonable means. A reply of stop, quit, end, revoke, opt out, cancel or unsubscribe always counts, other clear wording counts too, and you must honor the request within ten business days.⁵¹ The FCC has a draft order on its September 30, 2026 meeting agenda that would change parts of how opt-outs work, so check the current rule at [fcc.gov](https://www.fcc.gov) before you build your process.⁵² Either way, record each opt-out with its date and channel, and stop those messages at once.

§ RULE**Announce recording**

In California, recording a confidential call requires the consent of everyone on it,³⁶ and other states set their own rules. The simple standard that covers them is to announce recording at the start of each recorded call.

10.4

Data and real consent

Put customer data only into business plans, share the minimum, and if HIPAA covers you, never put patient information into a tool without a business associate agreement.^{37, 38} Update your privacy notice to say plainly where you use AI with customers, and write a one-page staff AI policy with the worksheet below.

Consent has to be real. In the case described in Chapter 9, the FTC said that clicking through mandatory terms of service is not opt-in consent for an invasive use of consumer data.³⁹ Ask plainly, ask separately, and record when and how you got the yes.

METHOD

Say It, Get It, Guard It

01

Say it. Disclose AI at the start of each chat, call and text thread, and offer a person.

02

Get it. Get and record consent before marketing calls or texts, AI voice calls and recordings, and honor each opt-out.

03

Guard it. Keep customer data in business-grade tools under contract, share the minimum, and keep your privacy notice honest about AI.

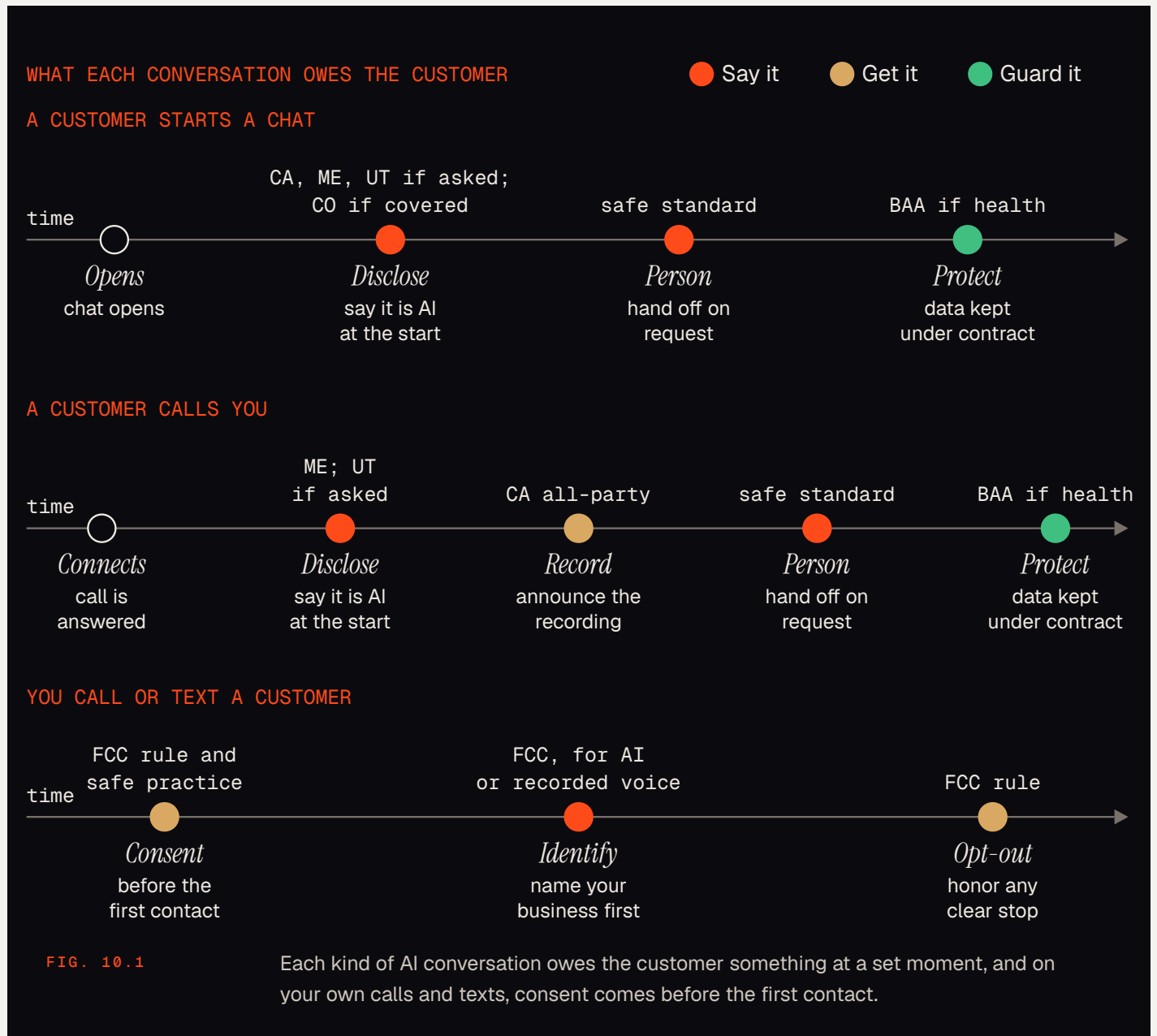
EXAMPLE

A dental group in Texas and California sets up an AI phone line

The greeting names the practice, says the caller is speaking with an AI assistant and says the call is recorded, which respects California's all-party consent rule.³⁶ The AI books, moves and confirms appointments.

California's generative AI notice rule names health facilities, clinics and physician offices, so a dental group may fall outside it, but this group follows it anyway: scheduling and billing are not patient clinical information under that rule, and any clinical message the AI sends without a licensed provider's review gets a spoken notice at its start and end.^{42, 48}

A clinical question, such as whether swelling after an extraction is normal, gets a promise of a clinician's callback and an urgent flag. In Texas, patients must be told when AI is used in their care.⁴¹ The group signed a business associate agreement with its phone vendor before the first call,³⁸ and its lawyer confirmed which of these rules apply in each state.



Disclosure and consent inventory

One row per channel. An empty cell on a channel where AI talks to customers is this week's fix.

CHANNEL	AI USED? DISCLOSURE WORDING	CONSENT CAPTURED: HOW AND WHEN	RECORDED? NOTICE GIVEN?	VENDOR TERMS AND OWNER
Website chat				
Phone				
Text messages				
Email				
Social messages				

NOTES

CHECKLIST

9 ITEMS

- ☐ Add a disclosure line to each AI chat, phone greeting and text template.
- ☐ Add “Would you like a person?” and make sure it works.
- ☐ Confirm prior express written consent is on file before any telemarketing call that uses an AI or prerecorded voice.^{50, 51}
- ☐ Get written consent before marketing texts too; it is the safe standard.⁵¹
- ☐ Make each AI or prerecorded voice message you send state your business name at the start.⁵¹
- ☐ Log each opt-out with its date and channel, and stop those messages.⁵¹
- ☐ Add a recording notice wherever calls are recorded.³⁶
- ☐ Review each AI vendor's data terms, and sign agreements where health data is involved.³⁸
- ☐ Set a quarterly reminder to recheck your state's AI rules.

One-page staff AI policy

Fill in each line, have the owner sign it, and give a copy to each person who uses AI at work.

POLICY LINE	YOUR ANSWER	OWNER
AI tools and accounts we approve		
What must never be pasted into AI		
Our Red list (Chapter 9)		
Who approves customer-facing output and scripts		
Our disclosure lines, by channel		
Who to call when AI gets it wrong		
Where mistakes and opt-outs are logged		
Date of the next review		

NOTES

CHAPTER 10 · IN SHORT

- 01

Say it is AI at the start, and offer a person.
- 02

Get recorded consent before AI voice calls, marketing texts and recordings, and honor each opt-out.
- 03

Guard customer data with business terms, signed agreements and a written staff policy.

TOOL · PLAN

The 90 day plan to become the business assistants *recommend*

START DATE _____

Work in order; each block assumes the one before it is done. One box is one action. Write an owner's initials beside each box before you start. The hours are this guide's estimate for one location with one web person helping.

DAYS 1 TO 30

Get found and get the facts right

About 12 to 16 hours.

-
- ☐ Week 1: verify Search Console and Bing Webmaster Tools.

 - ☐ Week 1: set Search generative AI to include.¹⁹

 - ☐ Week 1: write the master fact sheet (Chapter 6).

 - ☐ Week 2: run the baseline audit, checking each answer with the Shortlist Test (Chapters 1 and 7).

 - ☐ Week 2: check robots.txt and the security layer (Chapters 2 and 4).

 - ☐ Week 3: make your profiles and main review site match the sheet.^{8, 27}

 - ☐ Week 3: decide on Google's and Gemini's automated calls.^{14, 15}

 - ☐ Week 4: run the READ Check on your top ten pages (Chapter 4).

 - ☐ Week 4: add or fix Organization markup with sameAs.³¹

Done when: your baseline Share of Answer is recorded, each mirror matches the fact sheet, and your top ten pages pass READ.

DAYS 31 TO 60

Answer questions and show proof

About 15 to 20 hours.

- ☐ Run the Question Harvest (Chapter 5).
- ☐ Publish a Proof Page for each core service.
- ☐ Start the review routine: same ask, each customer, no rewards. ^{44, 45}
- ☐ Write your Traffic Light list (Chapter 9).
- ☐ Set up the Four D Loop for drafts and lead replies (Chapter 8).
- ☐ Add disclosure lines to each AI channel (Chapter 10).
- ☐ Run the Ten Call Test on any AI receptionist (Chapter 8).
- ☐ Run the second audit and change one thing.

Done when: core Proof Pages are live, the review routine runs, and each AI channel discloses and hands off to a person.

DAYS 61 TO 90

Be easy to choose and act on

About 10 to 14 hours.

- ☐ Fix booking and contact forms for people and agents (Chapter 4).
- ☐ Brief staff on AI callers. ^{14, 15}
- ☐ Confirm consent records and opt-out handling. ⁵¹

CONTINUED

- ☐ Sign the staff AI policy (Chapter 10).

- ☐ Review vendor terms and agreements.

- ☐ Run the third audit and fix the top three gaps.

- ☐ Retake the scorecard.

- ☐ Schedule a year of monthly audits and quarterly mirror audits.

Done when: your scorecard is 17 or higher, or each line scored below 2 has a dated fix.

TOOL · SCORE

Score yourself

Give each line 0 if it is not done or you do not know, 1 if it is partly done, and 2 if it is done and checked in the last 90 days. Be strict, then add up the column. The chapter in brackets fixes that line.

	STATEMENT	SCORE		
01	Search crawlers (Googlebot, bingbot, OAI-SearchBot, PerplexityBot, Claude-SearchBot) are allowed in robots.txt, and our security layer lets them and the user fetchers through. (Chapters 2 and 4)	0	1	2
02	Search Console's generative AI control is set to include, and someone read the Generative AI performance report this month. (Chapters 2 and 7)	0	1	2
03	Each key fact appears as text on our website: services, area, hours, phone and how pricing works. (Chapter 4)	0	1	2
04	Organization markup with the right LocalBusiness subtype and sameAs matches the visible page. (Chapter 4)	0	1	2
05	A signed master fact sheet matches Google Business Profile, Bing Places, Apple Business and our main review site, and each real location has its own verified profile and page. (Chapter 6)	0	1	2
06	Each core service has a Proof Page with first-hand proof. (Chapter 5)	0	1	2
07	Every customer is asked for a review the same way, with no rewards or filtering, and reviews get a reply within the time we set. (Chapters 5 and 9)	0	1	2
08	A fixed-question Monthly Answer Audit has run for at least three months, with results logged. (Chapter 7)	0	1	2

STATEMENT		SCORE		
09	Our phone gets answered, each new lead gets a fast acknowledgment and a person's follow-up, and booking works on a phone for people and for agents. (Chapters 4 and 8)	0	1	2
10	A written Traffic Light list exists; a person approves each Yellow-draft item, and each Yellow-scripted script was approved and is sampled weekly. (Chapters 8 and 9)	0	1	2
11	Each AI that talks to customers says so at the start and hands off to a person on request. (Chapter 10)	0	1	2
12	Consent for marketing texts, AI voice calls and recordings is captured and logged, opt-outs are honored, and AI vendors are under business terms, with an agreement where health data is involved. (Chapter 10)	0	1	2
Total, out of 24				

These bands are this guide's own judgment, not a platform rule.

YOUR TOTAL SAYS

0 to 8: at risk of being left out.

Start with Chapters 2, 4 and 6: crawlers, page text and matching facts.

9 to 16: in the running.

Work Chapters 5 and 7: publish Proof Pages, start the review routine and run the monthly audit.

17 to 24: easy to find, read and choose.

Keep the monthly audit and the Four D Loop running, and recheck the rules each quarter.

WORDS

Glossary

AEO (answer engine optimization)

Making your content the direct answer to a specific question, in an AI answer, an answer box or a spoken reply. An industry label, not a provider's term.²⁵

AI agent

Software that acts for a person, such as calling a business or booking an appointment.^{14, 15}

AI Mode

Google's conversational search for longer questions and follow-ups, with links to supporting sites.⁵

AI Overviews

Google's AI-written summaries shown at the top of some search results, with links to sources.⁵

bingbot

The name Bing's standard crawler uses in robots.txt. Bing's index powers Copilot.^{6, 22}

Business associate agreement

A written contract a health care provider covered by HIPAA needs before a vendor handles protected health information on its behalf.³⁸

Citation

A link or reference to a source shown with an AI answer. Bing notes that a citation is not a click.¹²

Content delivery network (CDN)

A service that delivers your site's pages from many locations and may include security settings, which is why Google and OpenAI tell you to check that it lets search crawlers through.^{3, 5}

Crawler

Software that visits web pages automatically. Search crawlers and training crawlers are often separate bots.^{21, 23, 24}

Entity

Your business as one identifiable thing with one set of facts across the web.

GEO (generative engine optimization)

Improving the chance your content is used and cited in AI-written answers. The term comes from a 2023 research paper.²⁶

Google-Extended

A token in robots.txt that limits use of your content for training Google's AI models and for grounding in some other Google systems. It does not control whether you appear in AI Overviews or AI Mode.^{5, 19}

Grounding

When an AI bases its answer on pages it retrieves at the time of the question. Google also calls it retrieval-augmented generation.²

Index, indexed

A search engine's stored copy of the pages it has crawled. A page that is indexed can appear in results; Google's AI features draw on the same index.^{2, 5}

llms.txt

A file some sites add to point AI tools to their key pages. Google says Google Search does not use it.^{2, 33}

LocalBusiness and Organization markup

Structured data types that describe a business. Google recommends Organization markup with the most specific subtype that fits, such as Dentist, a kind of LocalBusiness.^{31, 32}

noindex, nosnippet

Instructions on a page: noindex keeps it out of the index, and nosnippet stops text from it being shown. Either can keep a page out of Google's AI features.⁵

Query fan-out

When an AI turns one question into several related searches to gather more sources.^{2, 5}

robots.txt

A plain text file at the root of your website that tells crawlers, by name, which pages they may visit.¹⁸

sameAs

A structured data property that lists your official profiles on other websites.³¹

SEO (search engine optimization)

Making pages crawlable, indexable and useful so they rank in search results.

Share of Answer

This guide's audit measure: the answers that name your business divided by the questions asked.

Structured data

Code on a page that labels facts such as your name, address and business type, using the schema.org vocabulary.³¹

User fetcher

Software that visits a page because a person asked an assistant about it, such as ChatGPT-User, Claude-User and Perplexity-User. Anthropic says blocking Claude-User may reduce your visibility, and some user fetchers do not follow robots.txt.^{21, 23, 24}

VEO (voice engine optimization)

Making your business the one a voice assistant names, reads out or calls. An industry label, not a provider's term.

Yellow-draft, Yellow-scripted

This guide's two kinds of human checkpoint: a person approves each item, or a person approves a script once and reads a sample every week.

EVIDENCE

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