

Quarterly AI Visibility Notes: [Q# YYYY]

For service businesses: what changed, what stayed stable, and what to do next.

Publishing cadence: Quarterly (Jan-Mar, Apr-Jun, Jul-Sep, Oct-Dec). Duplicate this document each quarter and fill the placeholders.

At a glance (copy this into Slack/email)

- Quarter window: [Start date] to [End date]
- Primary markets/verticals covered: [e.g., local services / B2B services]
- Top 3 changes: [1] [2] [3]
- Top 3 actions this quarter: [1] [2] [3]
- What we are ignoring: [e.g., AI hacks, bulk fan-out pages]

1) Scope and assumptions

Fill this so readers understand what this update applies to (and what it doesn't).

- Sites reviewed: [#] sites / [#] domains
- Primary service type(s): [list]
- Primary goal: [Qualified inquiries / bookings / calls]
- Tracking sources: [Search Console] + [GA4] + [Call tracking/CRM if used]
- Constraints: [dev bandwidth, approval speed, compliance limits]

2) What changed (external environment)

Use only what matters for service businesses. Link to official docs where possible. Avoid speculative hot takes.

2A) Google Search: AI Overviews / AI Mode notes

Change: [What changed?]

Why it matters: [Impact on discovery/CTR/snippets]

What to do: [Concrete action]

Who it affects: [Which site types/queries]

Change: [What changed?]

Why it matters: ...

What to do: ...

Who it affects: ...

2B) ChatGPT / AI assistants notes (crawl + referrals)

Note: Separate (a) crawl access/readiness and (b) referral tracking/landing behavior.

Access/readiness update: [robots/WAF/crawl access notes]

What to do: [Action]

Owner: [Who will implement]

Referral/measurement update: [utm_source or reporting changes]

What to do: [Action]

Owner: [Who will implement]

3) What we observed (signals vs outcomes)

Report trends, not noise. Use clusters and page roles, not isolated keywords.

- Search Console signals (last 90 days vs previous 90 days): impressions, clicks, CTR, average position for the owner page + support cluster.
- Outcome metrics (GA4): key events / leads, conversion rate on owner service page, assisted paths (blog -> service page -> inquiry).
- Right-page ownership: which URL is winning hire intent? Any wrong-page ranking incidents?
- Routing: top support pages sending visits to the owner page; dead-end pages with high exits.

Add 1-2 screenshots/tables if you publish this as a PDF. Keep the post version clean and readable.

4) Playbook updates (what we are doing differently now)

- Update: [e.g., stronger answer blocks on service pages]
Reason: [what we saw]
Applies to: [which pages]
- Update: [e.g., proof block placement above CTA]
Reason: ...
Applies to: ...
- Update: [e.g., tighter topic borders to prevent overlap]
Reason: ...
Applies to: ...

5) Action checklist for this quarter (service business edition)

- Confirm one owner page per priority service (no overlap)
- Add/upgrade answer-ready sections (process, fit, pricing factors, timeline factors)
- Add proof blocks with context (what changed, timeframe, scope)
- Add routing bridges from top 5 traffic posts to the owner service page
- Validate tracking: GA4 key events + Search Console monitoring
- Decide keep/merge/redirect for overlapping pages (ownership first)

6) What we are ignoring (to avoid wasted effort)

- Special "AI files" that try to replace clarity (e.g., anything that does not improve the visible page).
- Fan-out page publishing for every query variation without a unique page job.
- FAQ spam as a substitute for decision support.
- Guarantees for AI mentions/citations.

7) Watchlist (next quarter)

- Watch item: [What you are monitoring]
Why: [risk/opportunity]
Signal to watch: [metric/event]
Action if it happens: [plan]
- Watch item: ...

8) Source log (what we referenced)

List official references and the specific change you took from them.

- Google Search Central: AI features and your website - [note]
- Google Search Central: Optimizing your website for generative AI features - [note]
- OpenAI: Overview of OpenAI crawlers - [note]
- OpenAI: Publishers and Developers FAQ - [note]
- Google Search Console help: definitions for impressions/clicks/position - [note]

Need help applying this to your site?

Search + AI Visibility: <https://seoinformatica.com/search-ai-visibility/>

Start with a Free Diagnosis: <https://seoinformatica.com/start/>

Email: labs@seoinformatica.com