

## MEMO

To [Name, title]  
From [Your name, role]  
Date [Date]  
Subject Where we stand in AI-assistant answers, and what I recommend

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### What changed

Buyers of [our category] are starting to ask an AI assistant before they search. The assistant gives one answer that names a few products, and a product it leaves out may never be considered. Our search rankings can look fine while this happens.

### What I measured

On [date] I asked [n] questions our buyers ask before choosing [a product like ours], across [which assistants]. That gave [n] answers.

- We were named in [n of n] answers and recommended in [n].
- Named most often: [competitors, with counts].
- Where we appeared: [how we were described; flag anything wrong or out of date].
- [Questions no page of ours answers, or pages assistants can't read].

### What it means for us

[One paragraph in your own numbers. Label every figure measured or estimated, and say where estimates come from]

### What I recommend

1. [The first fix]. Owner: [name].
2. [The page to write]. Owner: [name].
3. **Ask the same questions monthly**, in the same way, and report the count. Owner: [name].

### What it costs

[Team time and any tools, for one quarter]

### What waiting costs

[The competitor already named] is named in [n of n] answers today. Every quarter it holds that place, it's the option our sales team has to argue against.

### One caveat

Nobody controls these assistants, and nobody can promise a mention or a position. Treat any vendor who offers one as disqualified. What we can do is measure, fix what makes us hard to quote, and measure again. I'm proposing one quarter of that, with a number to judge it by.

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Method: [n] questions across [assistants] on [date], [settings]. Answers change with wording and over time; this is a dated snapshot, not a score.

## ILLUSTRATIVE EXAMPLE

Every figure here was written to show the shape, not measured.

### MEMO

**To** Dana Okonkwo, VP Marketing  
**From** Sam Reyes, Growth  
**Date** 8 October 2026  
**Subject** Where we stand in AI-assistant answers, and what I recommend

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### What changed

Buyers of contract software are starting to ask an AI assistant before they search. The assistant gives one answer that names a few products, and a product it leaves out may never be considered. Our search rankings can look fine while this happens.

### What I measured

On 6 October I asked 12 questions our buyers ask before choosing contract review software, across ChatGPT, Google AI Overviews, Gemini, Claude and Perplexity. That gave 16 answers.

- We were named in **10 of 16** answers and recommended in **2**.
- Named most often: **Redlinery** (8) and **Clausewell** (6).
- Where we appeared: Gemini said our team pricing isn't published, which is true, and ChatGPT repeated Clausewell's claim about clause libraries.
- Three questions have no page of ours to answer them, including both comparisons with a named competitor.

### What it means for us

Procurement teams are about a third of our new pipeline (*measured, CRM, last two quarters*). Assistants answered all three of their renewal questions without naming us. If a quarter of those buyers start with an assistant (*estimated, onboarding survey*), some of them are building a shortlist we're not on before sales hears from them.

### What I recommend

1. **Fill the gaps on pages we have.** State team sizes and seat pricing on the legal-teams page. Owner: Priya.
2. **Write the three missing pages:** renewals without a legal team, and a fair comparison with each competitor. Owner: Sam.
3. **Ask the same questions monthly**, in the same way, and report the count. Owner: Sam.

### What it costs

Team time only: about four days across Priya and me this month, then a few hours a month for the checks. No new tools this quarter.

### What waiting costs

Redlinery is named in 8 of 16 answers today, including two of the three about renewals. Every quarter it holds that place, it's the option our sales team has to argue against.

### One caveat

Nobody controls these assistants, and nobody can promise a mention or a position. Treat any vendor who offers one as disqualified. What we can do is measure, fix what makes us hard to quote, and measure again. I'm proposing one quarter of that, with a number to judge it by.

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*Method: 12 questions across five assistants on 6 October, signed out, UK, default mode. Answers change with wording and over time; this is a dated snapshot, not a score.*