

# AI Visibility Reporting Checklist for Agencies



## How to Use This Checklist

This checklist is designed to help agencies standardize AI visibility reporting across ChatGPT, Google AI Overviews, Perplexity, and other AI-driven answer engines.

Use it as:

- A monthly reporting reference
- An internal SOP for your team
- A quality-control check before sending client reports

## Who This Checklist Is For

This checklist is built for:

- SEO and digital marketing agencies
- Teams managing multiple client accounts
- Agencies offering white-label reporting
- Account managers responsible for monthly or quarterly reporting

If you report AI visibility to clients, this checklist applies.

## How Often to Use It

- **Weekly:** As a monitoring reference
- **Monthly:** Before sending client reports
- **Quarterly:** To review query sets and competitors



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## Before You Start

Before checking boxes, confirm:

- You are tracking a locked set of queries
- You are using consistent platforms each month
- You understand that AI visibility changes contextually, not instantly

## A) ACCOUNT SETUP

- Separate workspace per client
- Clear naming (client · market · region)
- Locked query set per client
- Team vs client access defined
- Query and competitor changes logged

## B) QUERY SETUP (WHAT YOU TRACK)

- Non-branded discovery queries
- Comparison / alternatives queries
- Branded accuracy queries
- Query intent documented
- Monthly tracking set locked
- Separate test / experiment queries

**Recommended: 30-60 queries per client**



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## C) METRICS CLIENTS ACTUALLY UNDERSTAND

### Core Visibility

- Brand mentions / citations
- Presence rate (% of tracked queries)
- Share vs competitors
- Month-over-month trend

### Quality Checks

- Explicit vs implicit mentions
- Correct brand naming
- Accurate pricing & features
- Positive / neutral context

### Business Signals

- AI-referred traffic (if measurable)
- Brand search lift
- Demo / buyer-intent signals



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## D) WHAT YOU DELIVER TO CLIENTS

- Agency-branded report (PDF or deck)
- Executive summary
- KPI snapshot
- Wins & losses
- Competitor snapshot
- Next-month action plan

## E) QUALITY CHECKS

- Evidence saved for key claims
- Priority queries re-run for consistency
- Brand facts manually verified
- Competitor mentions reviewed
- Changes documented vs last report



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## F) REPORTING RHYTHM

- Weekly monitoring
- Monthly reporting cadence
- Clear owner per task
- Escalation rules for negative mentions
- Rolling 90-day visibility plan

## FINAL REMINDER

- This is a reporting checklist, not an audit
- Focus on proof, consistency, and clarity
- Clients don't want tools — they want trust

