HOW TO BECOME THE #1 ANSWER ON AI

The AEO & RevOps playbook to dominate ChatGPT recommendations and drive B2B pipeline.



Founder's Note

The New Game of B2B Visibility

For months, I've been hearing the same frustration in meetings with Marketing Directors: traditional organic traffic is shrinking, old SEO tactics are losing momentum, and pipeline generation through content seems stagnant. What they don't realize, until we look at the data, is that their buyers haven't stopped searching; they've simply switched tools.

Your potential customers are already asking for software comparisons, service recommendations, and market reviews directly on ChatGPT and Perplexity. The question is: when they ask, is your company cited as the best solution, or does your competitor take the lead without any resistance?

I built this playbook because the transition to AEO (Answer Engine Optimization) isn't complex, but it requires a structured method. Writing traditional content is no longer enough. It requires CRM governance, sales call mining, and a tech stack to support the operation. What you're about to read in the following pages is the exact framework we use to turn artificial intelligence citations into predictable, trackable revenue.

Happy reading and good execution,

Breno Mendes
Founder, Dig RevOps



The Operational Imperative: Why AI Requires Structured Data?

Projections show that search volume on traditional search engines will drop 25% by 2026 as B2B buyers shift to generative AI assistants. Additionally, over 60% of searches are already zero-click, with answers consumed directly within the AI interface. ChatGPT alone has surpassed 900 million weekly active users.

What most executives overlook is that qualified traffic from AI recommendations boasts a sales conversion rate 4.4 times higher than traditional organic traffic. Large language models act as a rigorous qualification filter, recommending only brands with clear, structured data.

The marketing leader’s challenge isn't driving mass clicks—it's ensuring the company gets recommended by AI engines and proving how those recommendations convert into revenue inside the CRM. AEO (Answer Engine Optimization) isn't just a copywriting tactic; it's an operational discipline that requires direct alignment between sales and marketing.

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Chapter 1

Data Governance and Diagnostics in HubSpot

Before publishing any content, your CRM structure must be clean—AI algorithms rely on your company's institutional data as a foundational knowledge base.

• ICP & Product Alignment: Ideal Customer Profile (ICP) properties and product catalogs in HubSpot must be fully configured and updated.

• Brand Mapping & Data Hygiene: Register your brand across all spelling variations, and eliminate duplicate CRM properties to ensure attribution accuracy.

How do AI engines perceive your brand today?

A presence analysis classifies your company into one of the four positions on the right:



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Chapter 2

Sales Call Mining in Sales Hub

The richest source to uncover what AI engines are being prompted to answer doesn't come from traditional SEO tools. It comes from sales call recordings in Sales Hub and customer support tickets.

The marketing team must analyze meeting transcripts to extract the exact questions, doubts, and comparisons your customers use in their daily routines. These questions should be categorized into three stages:



Recordings

Sales calls are automatically recorded within Sales Hub.

Transcription

Call audio is converted to text with high accuracy.

Query Analysis

The text is mined to extract and classify buyer questions.

Questions extracted from three stages of the buyer's journey.

Discovery

Questions focused on the specific pain point or operational problem the customer is trying to solve.

Evaluation

Direct questions comparing your solution against specific competitors in the market.

Decision

Questions regarding technical implementation, data security, and financial ROI.

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Chapter 3

Content Engineering & The "Answer-First" Format

For an article to be cited as an official source by AI language models, the content must adhere to clear information architecture principles.

HubSpot tested this restructuring across its software comparison articles. By optimizing content to directly answer AI queries, they achieved a 642% increase in AI-generated citations and a 58% boost in high-intent search visibility.

01 Direct Answer at the Top: The first paragraph of each section must answer the main heading query directly, without long introductions.

02 Standalone Text Blocks: Each subsection must stand alone with complete context, using specific brand and product names rather than vague pronouns.

03 Proprietary Data Usage: Articles should feature unique research and anonymized internal data that cannot be found anywhere else on the web.

04 FAQ Architecture: Structure content to cover secondary variations of the core question, using clean Q&A formatting.

05 Commercial Solution Handoff: Educational explanations should seamlessly conclude by demonstrating how your product solves the problem in practice.

Anatomy of an Answer-First article



HubSpot
Case Study

642%
increase in citations generated

58%
increase in visibility for HubSpot

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Chapter 4

Revenue Attribution & Sales Handoff

Demonstrating strategy ROI requires measuring how AI citations translate into closed deals. To achieve this, the operation combines two HubSpot approaches:

Filter Tracking & Self-Reported Attribution: AI domain traffic is isolated in reports, and a question is added to commercial forms asking how the buyer found the company—capturing source data even when traffic appears as direct access.

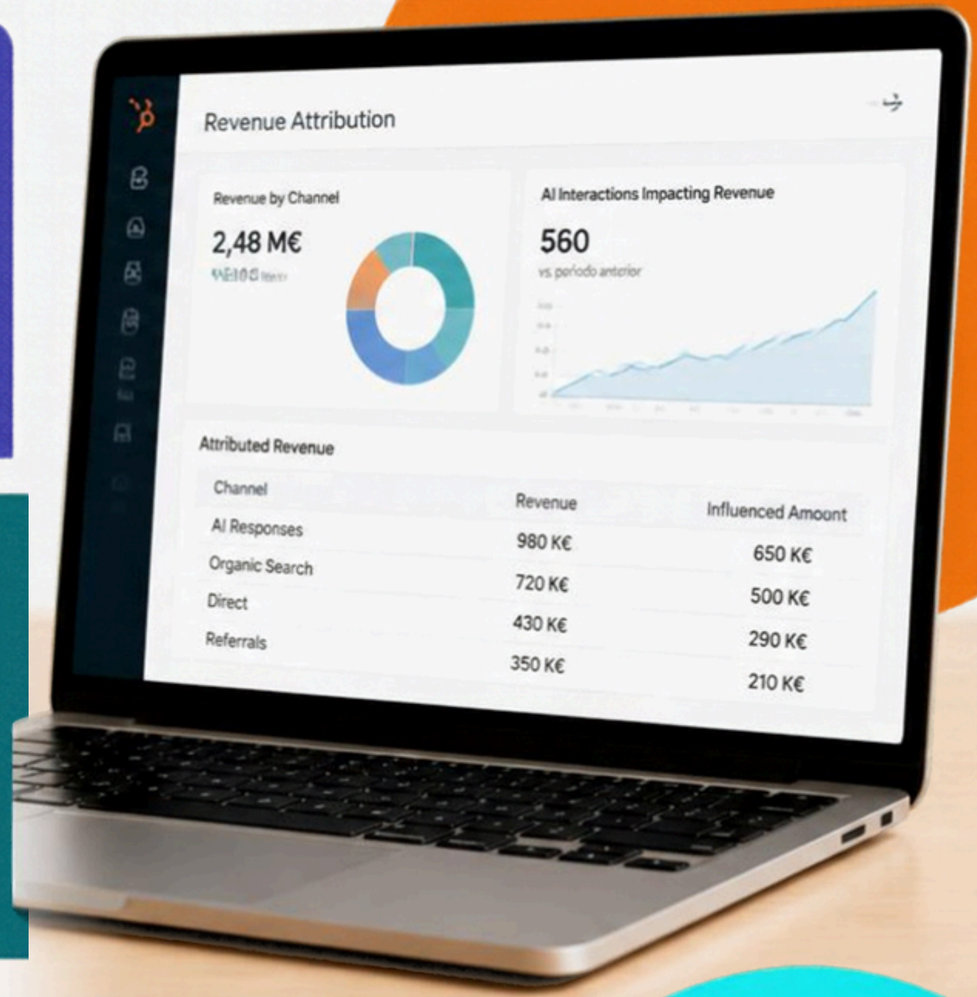
HubSpot Enterprise Attribution Models: First-touch attribution identifies which AI platforms generate net-new leads, while W-shaped attribution reveals how AI recommendations influence long-cycle B2B deals.

Lead handoff to the sales team must trigger immediate automations upon arrival:

AI-sourced leads receive a higher priority score in the CRM.

The system automatically generates a task in Sales Hub, alerting the sales rep to the opportunity's AI origin.

Commercial outreach addresses the exact buyer search query, eliminating generic pitches and shortening sales cycles.



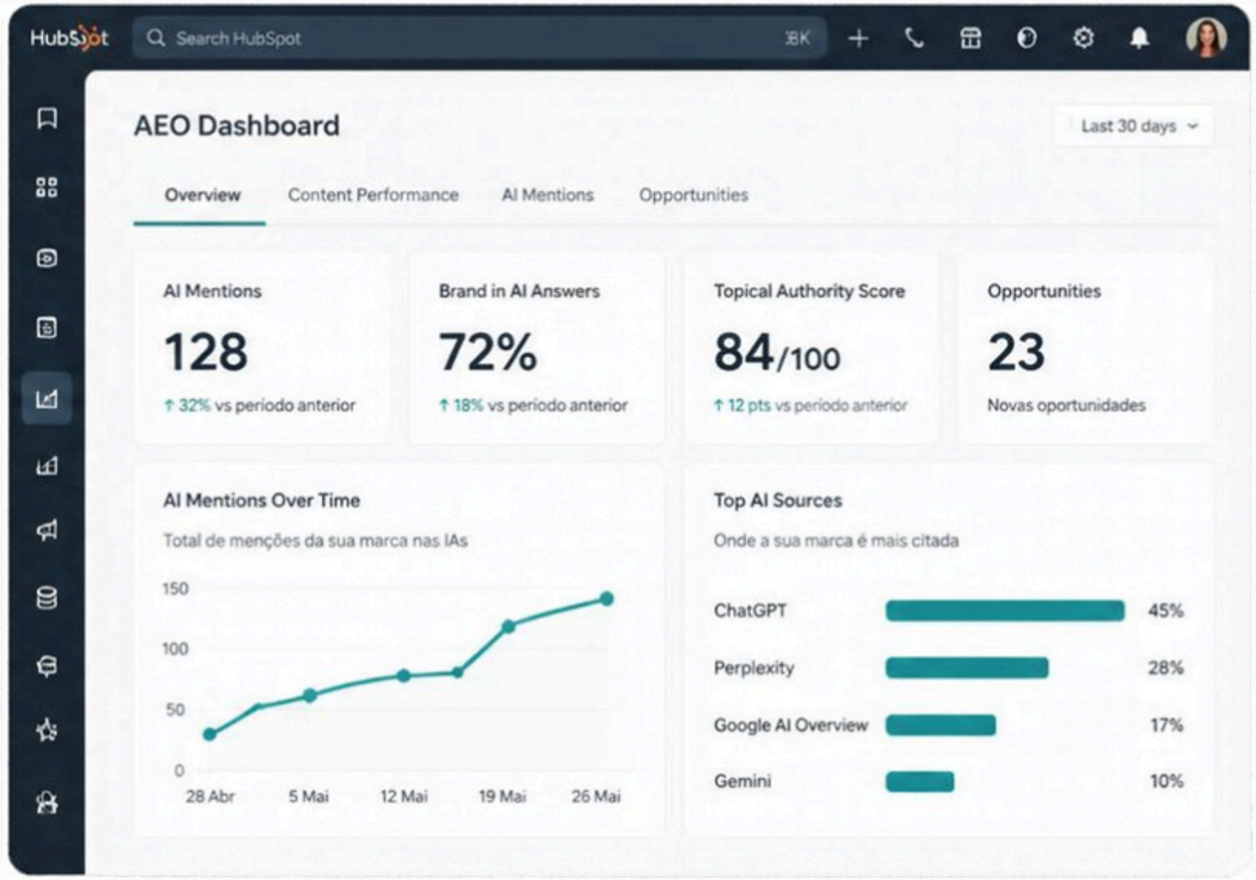
The Technology Behind the Strategy: HubSpot's Role in AEO

Running AEO manually—prompting ChatGPT with your company name every week to check responses—is inefficient and unscalable. To turn search intent into actionable business intelligence, you need specialized technology that continuously monitors AI engines.

At Dig RevOps, HubSpot is our primary platform for scaling this operation.

With HubSpot's native AEO tools, guesswork is eliminated. The technology enables daily tracking of your brand visibility across ChatGPT, Perplexity, and Gemini, benchmarks your market share against competitors, and pinpoints the exact sources AI uses to answer your buyers.

Combining the right technology with integrated RevOps processes directly links marketing content efforts to sales pipeline growth.



Want to discover how AI engines perceive your brand today and build a practical roadmap?

Book a RevOps & AEO Assessment

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