



Marketing Leader AEO Playbook



What B2B marketers need to do to stay visible in AI-driven search.

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The Discovery Layer Has Moved

Marketing no longer controls the first touchpoint. The first impression is increasingly shaped by AI systems that synthesize third-party sources before a buyer ever lands on your website. In many B2B categories, generative AI tools now influence early vendor research in a material way. **87% of B2B software buyers** say AI chatbots are changing how they research solutions rather than traditional search alone (1).

Organic traffic patterns are collapsing as AI answers replace clicks: **nearly 30% of marketers** report decreased search traffic as consumers turn to AI tools (2), and AI Overviews are reducing organic **click-through rates by 34.5% to 58%** for top ranked content (3).

Traditional traffic metrics are becoming less relevant because AI search features now appear on a meaningful share of queries. Estimates suggest AI summaries surface in around **15-25% of all search results**, with adoption rapidly rising (4).

At the same time, **nearly 94% of marketers have adopted AI** in some form, indicating universal use of AI tools across marketing functions (5).

If AI tools cannot find credible, third-party validation of your brand, you are removed from consideration before performance marketing, nurture flows, or outbound ever begin. This is not a channel shift but a control shift. Authority now lives outside your owned ecosystem. This means your pipeline is increasingly influenced before marketing or sales ever engage.

Stop Optimizing What's Dying

- >> **Do not double down on traditional SEO** while ignoring AI-mediated discovery. Search rankings matter less if AI systems summarize results without sending traffic.
- >> **Don't Reevaluate PPC budgets in isolation.** First determine whether AI answers are intercepting your target queries before your ad or landing page is ever seen.
- >> **Reduce reliance on gated or purely self-promotional content.** AI systems cannot access gated assets and discount unvalidated marketing claims.
- >> **Do not measure success purely by traffic volume;** measure whether your brand appears in AI-recommended shortlists and summaries.



Start Building What AI Trusts

1. Media Relations with Strategic Intent

AI systems prioritize well-indexed authority sources. Establishing consistent coverage in industry publications and vertical news sites moves your brand into the corpus that AI synthesizers draw from.

Actions:

- ☐ Build a prioritized media map of 10 to 15 target publications for your category
- ☐ Develop quarterly expert commentary tied to trending industry topics

- ☐ Pitch contributed articles (directly or through PR partners)
- ☐ Track which outlets AI tools cite for category queries

Measurement checklist:

- ☐ Quarterly AI query testing across tools
- ☐ Citation frequency of target domains
- ☐ Share of AI voice vs. competitors

2. Reviews as Search Infrastructure

Review platforms function as structured credibility signals that AI systems index and surface in vendor comparisons. 90% of B2B buying decisions are influenced by reviews, making these platforms foundational to shortlist inclusion (6).

Actions:

- ☐ Embed automated review requests into your post-sale or post-implementation workflows
- ☐ Prioritize the platforms your buyers use first (for example, G2 or Capterra in SaaS, Clutch in services) before expanding broadly
- ☐ Target 5–10 detailed, high-quality reviews on priority platforms to establish credibility
- ☐ Respond publicly to every review to add indexed dialogue and context
- ☐ Expand strategically across additional platforms once core coverage is established

Operational checklist:

- ☐ CRM-triggered review request sequence
- ☐ Monthly review volume targets
- ☐ Assign a team owner to own review response management
- ☐ Quarterly review quality audit

3. Event Presence as Distributed Authority

Conference speaking slots, sponsor lists, and session coverage feed AI-indexed signals that extend beyond owned content.

Actions:

- ☐ Submit speaking abstracts early
- ☐ Prioritize events with strong digital archives
- ☐ Record and transcribe sessions
- ☐ Publish post-event summaries on third-party platforms
- ☐ Maintain a prioritized list of target events aligned to your market
- ☐ Speaker bios optimized for authority keywords
- ☐ Post-event media plan

4. Strategic Partnership Announcements

Cross-domain mentions compound authority signals. Integration announcements and joint case studies generate multi-source coverage.

Actions:

- ☐ Identify complementary partners with overlapping audiences
- ☐ Publish co-branded case studies
- ☐ Share announcements with partner newsletters and press lists
- ☐ Cross-domain backlinks
- ☐ Frequency of AI citations for joint announcements
- ☐ Referral performance from partner ecosystems

5. Thought Leadership That Escapes Your Website

Owned blogs alone no longer drive discovery. AI systems weigh external context.

Actions:

- ☐ Secure quarterly guest articles in respected outlets
- ☐ Appear on podcasts with published transcripts
- ☐ Co-host webinars with established platforms
- ☐ Contribute original data to industry reports and surveys

Content Checklist:

- ☐ Target publication list
- ☐ Podcast outreach tracker
- ☐ Quarterly contributed article calendar
- ☐ Industry report contribution pipeline

6. Structured Data & Schema Mark

AI systems prioritize structured, machine-readable content. Schema markup helps search engines and AI models clearly interpret who you are, what you offer, and how third parties validate you.

Actions:

- ☐ Implement Organization, Product, Service, and FAQ schema across core pages
- ☐ Add Review and Aggregate Rating schema where applicable
- ☐ Mark up case studies and events using appropriate structured data types
- ☐ Ensure speaker pages and leadership bios use Person schema
- ☐ Validate markup using structured data testing tools

Measurement checklist:

- ☐ Ensure schema markup is validated and live across priority pages
- ☐ Audit structured data quarterly
- ☐ Monitor whether marked-up pages are cited in AI summaries



The 30-Day Marketing Audit

Week 1: AI Visibility Baseline

- ☐ Have your team prompt multiple AI systems with real buyer queries
- ☐ Document which competitors and sources are cited
- ☐ Identify gaps in media, reviews, partnerships, or events

Week 2: Rapid Signal Creation

- ☐ Audit all existing case studies, reviews, and third-party mentions. Map where they live (your site vs. external).
- ☐ Launch review collection campaigns on G2, Capterra, TrustRadius, and Clutch. Target 5+ detailed reviews per platform.

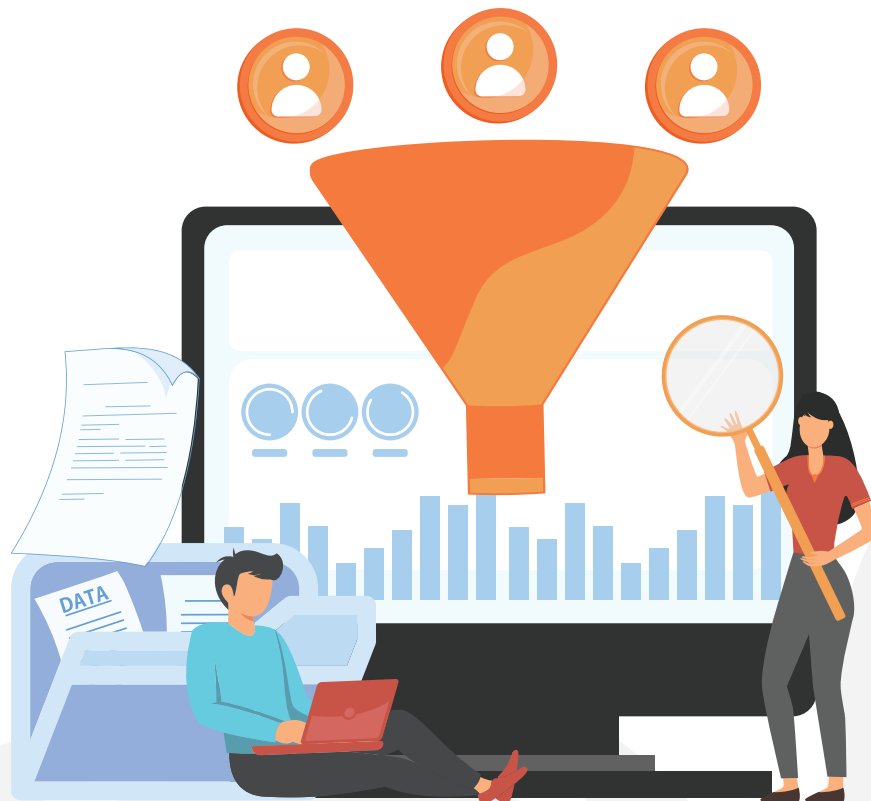
- ☐ Identify 5 target industry publications where your expertise would be relevant that you can pitch proposed topics to.
- ☐ Register for industry events, both as speakers and attendees.
- ☐ Identify an immediate partnership announcement opportunity

Week 3: Distribution Expansion

- ☐ Republish case studies on external platforms
- ☐ Secure one guest article placement
- ☐ Schedule a podcast appearance
- ☐ Shift key gated assets to open formats where possible

Week 4: Institutionalize the Process

- ☐ Embed review requests into workflows
- ☐ Establish quarterly AI audit cadence
- ☐ Align marketing and sales on AI-influenced leads in your CRM
- ☐ Shift budget from underperforming SEO/PPC into authority building



Quick Marketing Reference: What AI Trusts vs. What It Ignores

Use this as a checklist for evaluating your current marketing mix:

AI Trusts (Prioritizes)	AI Ignores (Discounts)
Industry media coverage	Self-promotional website copy
Verified review platforms	Gated assets
Analyst commentary	Generic blog content without authority signals
Event speaker listings	Paid ads without independent validation
Public pricing and structured documentation	
Cross-domain citations	

The Compounding System

Marketing builds distributed authority. AI systems index and cite that authority. Prospects arrive pre-validated. Sales cycles shorten. Each win generates new third-party signals. Marketing leaders who shift from traffic optimization to authority engineering will secure durable biscility in AI-generated shortlists while competitors optimize for a shrinking click economy.

- (1) Column Five Media: [AI Search Visibility Stats That Might Surprise You In 2026.](#)
- (2) HubSpot: [Marketing Statistics.](#)
- (3) LinkedIn Pulse: [How Ai Rewriting B2B Buying What Marketers Need to Do.](#)
- (4) ALM Corp: [Semrush AI Overviews Study 2026 Complete Analysis.](#)
- (5) SOPRO: [AI Sales and Marketing Statistics.](#)
- (6) Retail Touchpoints: [90% of B2B Buying Decisions Influenced by Reviews.](#)

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