

From Insights to Action: Your 30-Day AEO Plan

Introduction

Use this worksheet to translate your AEO measurement data into a structured four-week action plan. Start by documenting your baseline, choosing your priorities, then follow the weekly framework to build consistent AEO practices.

Your name:

Brand/domain:

Start date:

Step 1: Document your baseline.

Before you take any action, record where you stand today. These numbers become the benchmarks you'll measure against at the end of 30 days. If you don't have data for a metric yet, write "not yet tracking" and use this plan to set it up.

Metric	Current value	Where you found it
AI referral traffic (sessions/month)		
AI referral conversion rate		
Branded search impressions (GSC)		
Brand visibility score		
AI share-of-voice vs. top competitor		
Manual prompt test results (# of times/ # of prompts)		

From Insights to Action: Your 30-Day AEO Plan

⚡ **Tip:** Run the HubSpot AEO grader for a free baseline score across ChatGPT, Perplexity, and Gemini before filling in this table.

Step 2: Choose your priorities.

You can't do everything at once. Based on your baseline data, check the two or three priorities that will have the biggest impact on your AEO performance this month.

- ☐ **Start tracking AI referral traffic.** You don't have GA4 set up to isolate AI-referred sessions yet.
- ☐ **Improve brand visibility score.** AI engines mention competitors more often or more favorably than your brand.
- ☐ **Increase citation rate.** Your content isn't being linked or referenced in AI-generated answers.
- ☐ **Establish a prompt tracking routine.** You haven't tested how AI engines respond to your customers' questions.
- ☐ **Optimize existing content for AI.** You have strong content that isn't structured for AI citation.
- ☐ **Build competitive intelligence.** You don't know how competitors are showing up in AI answers.

Why these priorities? What did your baseline data tell you? Add your response below.

Step 3: Your four-week plan

Week 1 · Days 1-7

Set up your measurement foundation.

Goal: Every tool you need is configured and collecting data by the end of the week.

From Insights to Action: Your 30-Day AEO Plan

☐ **Set up AI referral tracking in GA4.**

Create a custom exploration, filtering session source to AI platform domains (chat.openai.com, perplexity.ai, gemini.google.com).

☐ **Run the HubSpot AEO Grader and save your baseline report.**

☐ **Conduct your first manual prompt test.**

Write five to ten questions your customers would ask AI engines. Run each one in ChatGPT, Perplexity, and Google AI. Record whether your brand appears, how it's described, and whether it's linked.

☐ **Set up branded search monitoring in Google Search Console.**

Filter the Performance report by queries containing your brand name. Note current impressions and click-through rate.

☐ **If using HubSpot AEO tools: Confirm brand details and add your first set of prompts.**

Week 2 · Days 8–14

Analyze patterns and identify gaps.

Goal: You have a clear picture of where your brand is visible, where it's missing, and why.

☐ **Review your first week of AI referral data in GA4.**

Note volume, engagement rate, and conversion rate compared to organic search traffic.

☐ **Analyze citation patterns.**

From your manual prompt tests or AEO tool data, identify which of your content pages AI engines cite, and which competitor or third-party pages appear instead.

☐ **Map your content gaps.**

For prompts where your brand doesn't appear, identify whether the gap is a content gap (you don't have content on the topic), a structure gap (you have content but it isn't formatted for AI extraction), or an authority gap (other sources are more cited).

☐ **Run a competitor comparison.**

From Insights to Action: Your 30-Day AEO Plan

Pick your top two to three competitors and compare how often they appear in the same prompts. Note where they show up and you don't.

Add the top three gaps you've identified below.

Week 3 · Days 15–21

Take action on your highest-impact gaps.

Goal: You've created or optimized at least two or three pieces of content based on your analysis.

- ☐ **Prioritize your content actions.**
Rank gaps by potential impact. Focus on prompts where you're close to appearing (mentioned by some engines but not others) or where you have existing content to restructure.
- ☐ **Optimize one or two existing pages for AI citation.**
Add clear, direct answers near the top of the page. Use descriptive headings that match how customers phrase questions. Include entity-consistent brand information.
- ☐ **Create one new piece of content targeting an uncovered prompt.**
Structure it with answer-first formatting, clear definitions, and concise sections that can stand alone as retrievable chunks.
- ☐ **Strengthen off-site signals for your priority topics.**
This could mean updating third-party profiles, contributing expert commentary to industry publications, or engaging in community discussions where your topic expertise is relevant.

Add the content you've created or optimized this week.

From Insights to Action: Your 30-Day AEO Plan

Week 4 · Days 22-30

Measure, compare, and plan forward.

Goal: You can articulate what changed, what worked, and what you'll do next.

- ☐ **Re-run your manual prompt tests using the same prompts from Week 1.**
Compare results side by side.
- ☐ **Pull your updated AI referral traffic data from GA4.**
- ☐ **Compare the 30-day trend to your baseline.**
Note any changes in volume, engagement, or conversion rate.
- ☐ **Check branded search trends in Google Search Console.**
Look for changes in branded query impressions that might indicate growing AI-driven awareness.
- ☐ **Review your visibility score and share-of-voice (if using an AEO tracking tool).**
Compare to your Day 1 baseline.
- ☐ **Document what worked, what didn't, and what to prioritize next.**

Step 4: Your 30-day review

Return to this section at the end of your 30 days. Compare your results to the baseline you recorded in Step 1, and use the reflection prompts to plan your next cycle.

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From Insights to Action: Your 30-Day AEO Plan

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Reflection questions

What was the single most useful insight you gained in the past 30 days?

What surprised you about how AI engines describe or cite your brand?

What are your top two to three priorities for the next 30 days?