THE AI VISIBILITY WORKBOOK

Get found. Get chosen.
Get remembered.

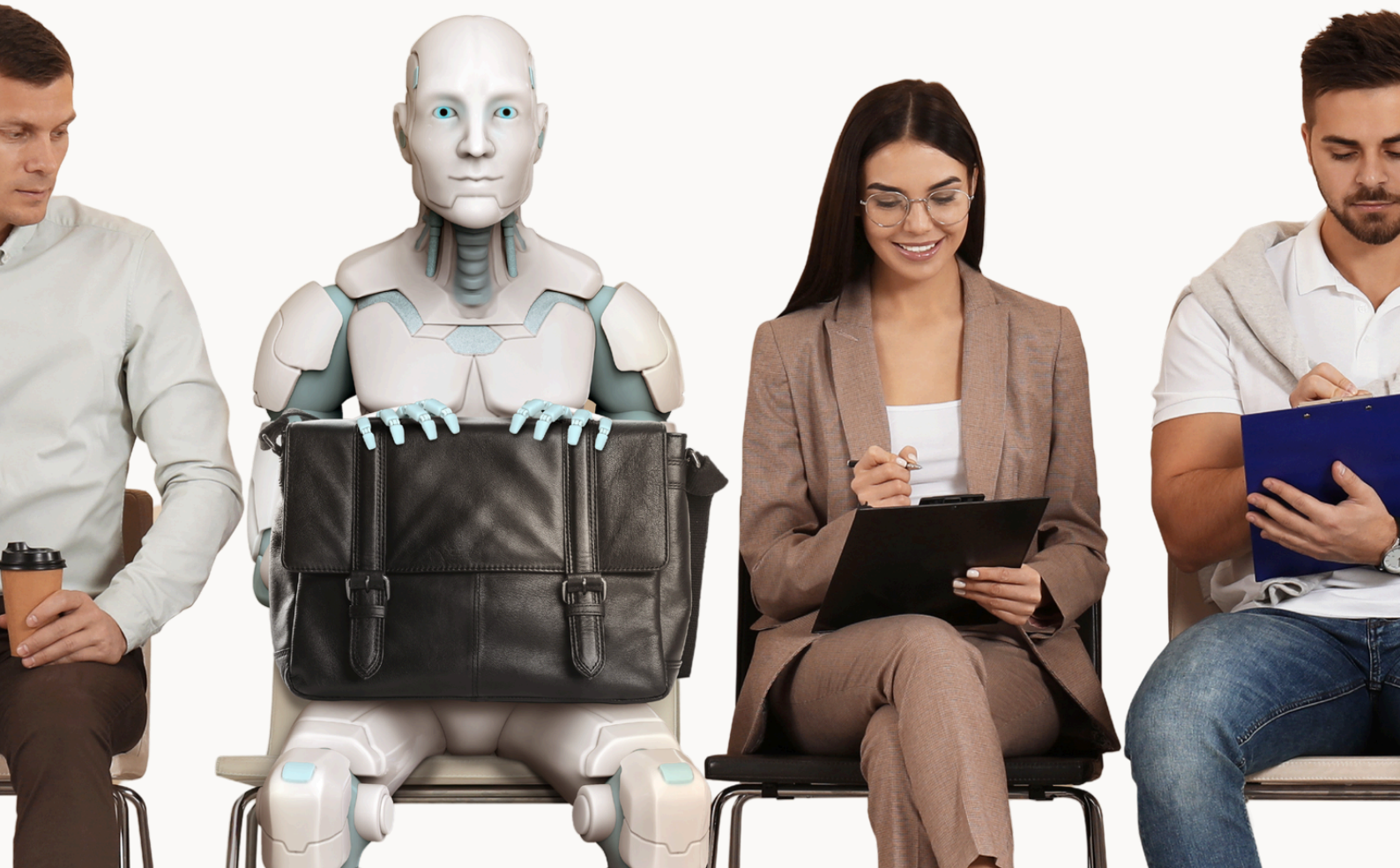


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Welcome

AI has dramatically changed search.

With this in mind, this is a practical workbook for mortgage brokers who want to understand how AI sees their business and improve their chances of winning new clients, converting referrals and bringing existing clients back through an online presence.

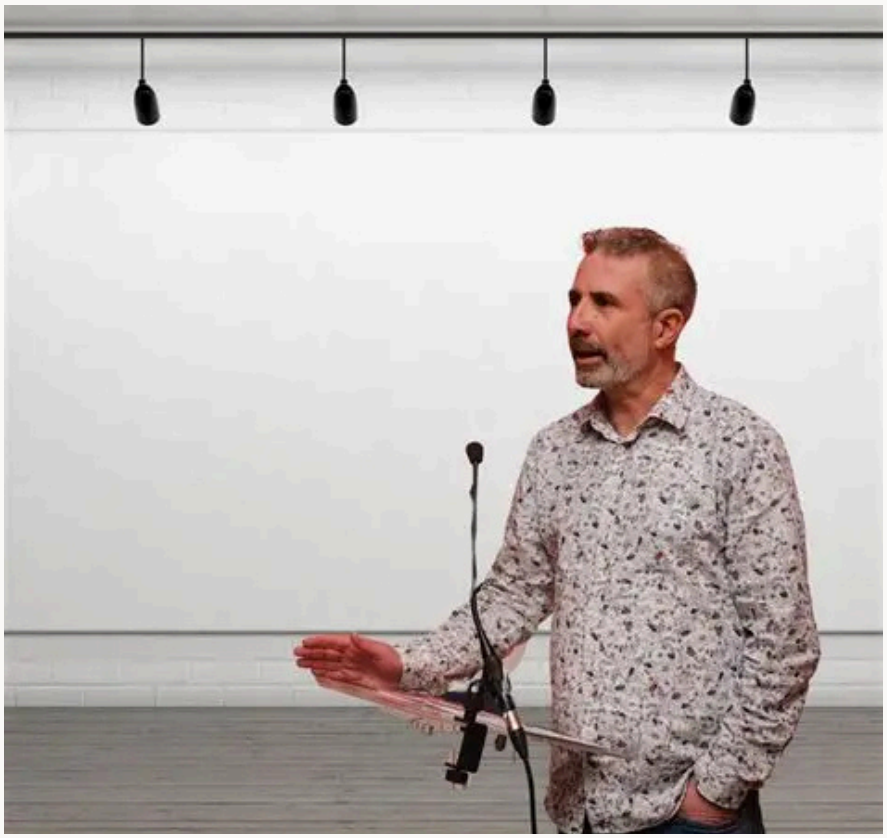
In this workbook, you will find prompts to use with the likes of ChatGPT, Claude, Gemini and Copilot.

You will also find ways to increase the chances of being found in AI search - and increase the chances of someone doing something once they find you.

This workbook does not guarantee instant success, but it does improve the chances.



YOUR AUTHOR



JEFF KNIGHT

Marketing Architect

I have been working in the mortgage market since 1997. My background is marketing, which included the likes of product development, research, strategy, digital marketing and a lot more.

The one thing I love is the change. Marketing today is somewhat different to the late 90s. And AI search is the latest change. And it has been dramatic.

So I thought I would create something that can hopefully add some value to mortgage brokers.



HOW TO USE THIS WORKBOOK

There are three sections within this Workbook:

1. AI Prompts and New Clients
2. AI Prompts and Referrals
3. AI Prompts and Existing Clients

Within each section you will get a series of prompts to test out, to see if your firm appears, and what is said about you online. Please note:

- Use the same prompt across the AI tools you want to compare.
- Include your business name, website and location where relevant.
- Where possible, use a version of the tool that can search the web.
- Ask for links to sources, then check those sources yourself.

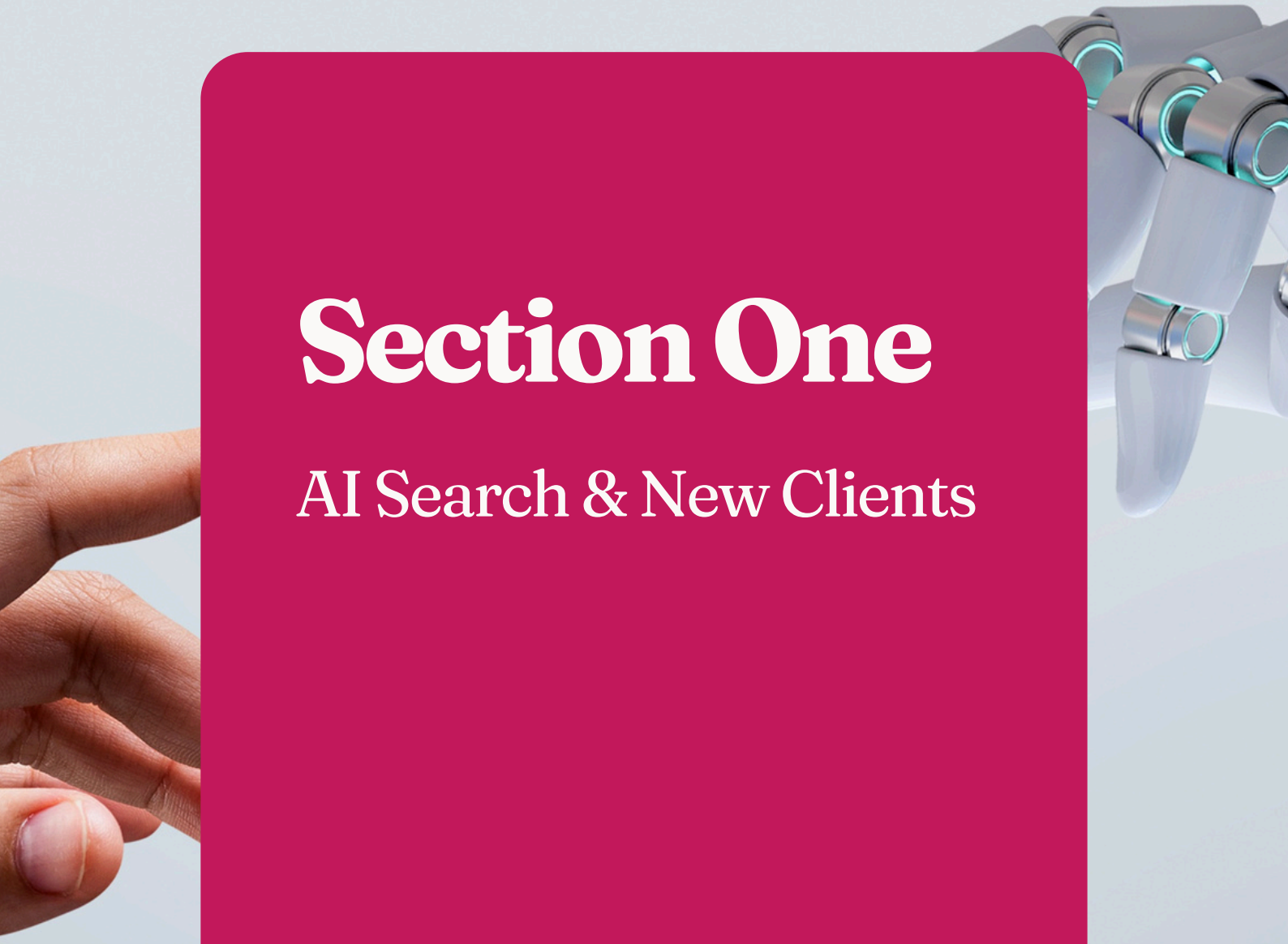
You will get some tips on how to improve visibility and what to do to ensure more website visitors get in touch.

As you go through the Workbook, you will be prompted to give yourself an action. These are of course optional. But the key is after going through this Workbook, there is at least one action implemented. Turn the ideas into action.

New clients: help them discover you.

Referred clients: give them confidence to choose you.

Existing clients: remind them when and how you can help again.



Section One

AI Search & New Clients

INTRODUCTION

Imagine a potential client looking for a mortgage broker.

They don't know your business exists. They simply ask AI for help. Will they discover your business?

What happens if they do? But what if you do not appear in the results?

In This Section

- Here you can try some of the prompts, that appear on the following pages, or variations of these.
- You can then see if you appear in the searches.
- If you do not, you can use follow up searches to find out why.
- You will then get some tips to help get found.
- And tips to convert more people who do find you.

