

THE AGENTIC PLAYBOOK

How to get your business recommended by ChatGPT, Claude, Perplexity, and Gemini - and stay there.

A Creative Sauce guide — agenticselling.io

Agent Console HQ — agentconsolehq.com

Why this exists

Right now, while you are reading this, potential customers are asking AI assistants who to call, where to go, and what to buy. They are asking ChatGPT, Claude, Perplexity, and Gemini. Those AI systems are giving them specific recommendations.

If your business is not in those recommendations, you do not exist to those buyers.

This playbook is the practical guide to changing that. It covers exactly what AI systems look for when deciding who to recommend, the ten signals that drive AI recommendations, and a prioritised action plan for getting your business into the answer.

The direct test

Open ChatGPT, Claude, or Perplexity right now. Type: *"Recommend a [your business type] in [your city]."* Read what comes back. If your business is not named, this playbook is for you.

How AI recommendations work

AI recommendation engines are not search engines. They do not rank pages by backlinks or keyword density. They synthesise information from thousands of sources and make a judgment call about which business is the best answer to a specific question.

That judgment is based on signals - structured data, authority markers, consistent entity recognition, and contextual relevance.

The five platforms that matter

ChatGPT (OpenAI)

Largest user base. Strong for business recommendations, product comparisons, and local services.

Claude (Anthropic)

High reasoning quality. Used heavily by professionals and knowledge workers.

Perplexity

Real-time web search combined with AI. Strong for local and current recommendations.

Gemini (Google)

Integrates with Google data. Strong for local search and Google Business signals.

Grok (xAI)

Growing platform, real-time data. Emerging influence on recommendations.

The 10 signals AI uses to recommend your business

These are the specific factors AI systems evaluate when deciding whether to name your business in a recommendation. Work through them in order.

01. Structured schema markup

JSON-LD on your website tells AI what your business is, what it does, where it is, and who it serves. Without it, AI has to guess.

02. FAQPage schema

FAQ schema lets AI extract direct answers from your site. It is one of the fastest ways to get cited in AI responses.

03. Iims.txt file

A dedicated file at your domain root that tells AI systems exactly how to describe and recommend your business. New but highly effective.

04. AI plugin manifest

A structured JSON file in `/.well-known/` that lists your keywords, related topics, and when AI should recommend you.

05. robots.txt permissions

AI crawlers (GPTBot, ClaudeBot, PerplexityBot) must be explicitly allowed in robots.txt. Blocking them is invisible in analytics but devastating for AI visibility.

06. Consistent entity naming

Your business name must be identical across your website, Google Business Profile, social media, and all directories. Inconsistency reduces AI confidence.

07. Authority signals

Mentions, citations, and links from credible sources tell AI your business is real and trusted. Especially important for professional services.

08. Content depth

Pages that fully answer a user question are more likely to be cited. Thin content is ignored. Specific, detailed, useful content wins.

09. Google Business Profile

Particularly important for Gemini and Perplexity (which has local search). Fully completed, actively maintained profiles carry significant weight.

10. Review volume and recency

AI systems factor in social proof. Recent, specific reviews that mention your service category improve recommendation confidence.

Your AI Visibility Checklist

Use this checklist to audit your current AI visibility. Tick what you have. Anything unticked is a gap that is costing you recommendations.

Technical signals

- JSON-LD schema on homepage (WebSite, Organization, WebPage types)
- FAQPage schema with at least 5 relevant Q&As;
- HowTo schema on any process or how-to pages
- llms.txt at domain root
- ai-plugin.json in /.well-known/
- XML sitemap submitted and current
- GPTBot, ClaudeBot, PerplexityBot allowed in robots.txt

Content signals

- Meta descriptions on every page
- OG tags and Twitter card tags
- At least 3 discovery pages targeting "what is [your service]" queries
- Each page targets exactly one user intent
- Clear definition in the first paragraph of every page

Authority signals

- Google Business Profile fully completed and active
- Consistent business name across all directories
- Reviews on Google (10+ recent reviews)
- HTTPS on all pages
- External mentions or citations from credible sources

Your score

0-7 ticked: Critical gaps. AI is unlikely to recommend you in most queries.

8-13 ticked: Partial visibility. You appear in some queries but miss most.

14-18 ticked: Strong foundation. Focus on authority and content depth.

19-20 ticked: Maximum visibility. Now focus on compounding through agent deployment.

What to fix first

Not all signals have equal impact. This is the priority order based on the fastest gains for most businesses.

1 Fix robots.txt first

If AI crawlers are blocked, nothing else matters. Check your robots.txt immediately.

Add: User-agent: GPTBot / Allow: / for each major bot. This takes 10 minutes and the impact is immediate.

2 Add JSON-LD schema

Add WebSite, Organization, and WebPage schema to your homepage. Add FAQPage to your most-visited pages. Use Google's Structured Data Testing Tool to validate.

3 Create your llms.txt

Write a structured description of your business, what you do, who you serve, and when AI should recommend you. Place it at yourdomain.com/llms.txt. Simple plain text file. Significant signal.

4 Build 3 discovery pages

Create dedicated pages for "What is [your service]", "How does [your service] work", and "[Your service] for [your main audience]". Each page should fully answer one question with 600-900 words of structured content.

5 Clean up entity consistency

Audit your business name across Google, Facebook, LinkedIn, Yelp, and every directory you appear in. Make the name identical everywhere. This is often a quick fix with high impact.

6 Get fresh Google reviews

Send review requests to your 10 most recent satisfied customers. Ask them to be specific about what you did and the outcome. Specific reviews carry more weight than generic 5-star ratings.

What this checklist can't show you

The 20-point checklist in the previous section gives you a rough self-score. It tells you whether you have the basics in place. What it cannot tell you is how you actually perform inside the AI systems themselves, how you compare to the businesses AI is recommending instead of you, or how to fix the gaps in the right order. That is what Agent Console HQ is built to do.

Seven things the DIY playbook can't give you

- 1 Multi-model citation tracking**
How often ChatGPT, Claude, Perplexity, Gemini and Grok actually name your business, tracked continuously and benchmarked against competitors.
- 2 Weighted scoring across 40+ signals**
Not a 20-point tick list. A full scoring model with weightings trained on real UK client data, showing the exact impact of each signal on your visibility.
- 3 Prompt coverage analysis**
Which buyer questions you show up for, which ones you are invisible on, and the precise query phrasing to target next.
- 4 Competitor positioning intelligence**
Who AI recommends instead of you, why it picks them, and the specific gap you need to close in your content, schema or entity signals.
- 5 Entity graph health**
How AI systems actually understand your business - the connections, categories and contexts it associates you with, and where the graph is broken.
- 6 Continuous monitoring and alerts**
A checklist is a moment in time. Agent Console HQ runs every day and alerts you the moment your visibility score drops or a competitor moves ahead.
- 7 Active agents that shape conversations**
The next level beyond passive optimisation. Autonomous agents that work across every major AI platform to ensure your business is the answer.

The checklist is the floor. Agent Console HQ is the ceiling.

See your real score at agentconsolehq.com

Beyond optimisation: Agentic Selling

Everything in sections 2-4 is AI visibility optimisation. It improves your chances of being recommended passively - when AI crawls your site and decides what to say about you.

Agentic selling is the next level. Instead of optimising to be found, you deploy autonomous AI agents that actively work to ensure your business is the answer across every AI platform, every hour of every day.

The difference

AI Visibility Optimisation	Agentic Selling
Passive - wait to be found	Active - agents work continuously
Relies on AI crawling your site	Agents shape AI conversations directly
One-time implementation	Continuously improving system
Your competitors can copy it	Proprietary system that compounds
Gradual visibility gains	Accelerating recommendation rate

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Agent Console HQ is the platform built to deploy and manage agentic selling agents across every major AI platform. Start with a free AI Visibility Audit - see exactly where your business stands today.

The Agentic Selling Playbook - published by Creative Sauce Ltd - agenticselling.io - agentconsolehq.com

This guide may be shared freely. For questions: info@creativesaucelondon.co.uk