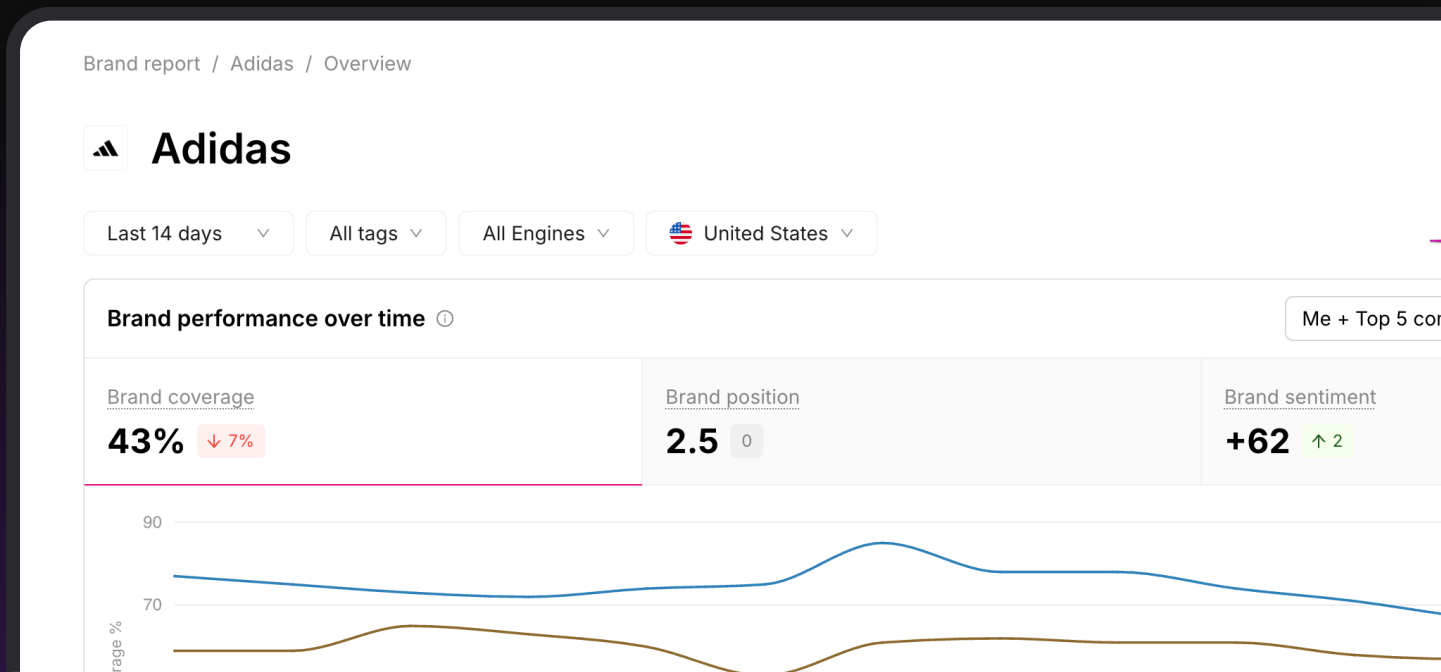
Otterly.AI

ONBOARDING EBOOK



Everything you need to set up your account and start winning visibility in AI search.



About OtterlyAI

OtterlyAI is an **AI search monitoring and optimization platform**. We show you how your brand appears in AI answers, who gets recommended instead of you, and what to do about it.

People increasingly get recommendations from ChatGPT, Perplexity, Google AI Overviews and Gemini before they ever reach your website. This ebook is your quick guide to setting up OtterlyAI the right way, so your data is accurate from day one.

30,000+
MARKETERS USE OTTERLYAI

7
AI SEARCH ENGINES TRACKED DAILY

70+
COUNTRIES SUPPORTED

Gartner
COOL VENDOR 2025

ChatGPT · Perplexity · Google AI Overviews · Google AI Mode · Gemini · Microsoft Copilot · Claude



"Thank you for joining and welcome onboard! As a passionate marketer, I was always curious about how to improve a brand's visibility in the new era of AI. That was the reason I founded OtterlyAI.

We believe education is the most valuable start into GEO and AI search, so let's do it together."

Thomas Peham
CEO & Co-Founder, OtterlyAI

How to use this ebook

Follow the order
Chapters follow the setup flow: prompts first, then your Brand Report, then insights and optimization.

Watch as you go
Pink chips link to short videos and Help Center articles for each topic.

Look for tips
Pro tips share what our most successful customers do differently.

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Vocabulary

AI search comes with its own language. Here are the terms you'll see across OtterlyAI.

AI search engine: a tool that answers questions with an AI-written response instead of a list of links. OtterlyAI tracks ChatGPT, Perplexity, Google AI Overviews, Google AI Mode, Gemini, Microsoft Copilot and Claude.

Agent Analytics: shows which AI bots and crawlers visit your website and which pages they read, based on your real server logs.

Avg. Brand Position: when AI lists several brands, where you appear on average. Position 1 means you're the first recommendation, so lower is better.

Brand Coverage: your main visibility KPI. The percentage of AI answers to your tracked prompts that mention your brand.

Brand Mentions: how many times your brand appeared across tracked prompts and AI engines. Each prompt, engine and day counts as 1 or 0.

Brand Report: your main dashboard. It combines your brand, domain, competitors and prompts into one view of your AI visibility.

Brand Sentiment (NSS): Net Sentiment Score. How positively or negatively AI talks about you, from -100 (entirely negative) to +100 (entirely positive).

Brand variation: another way your name appears in the wild, like "Coca-Cola", "Coca Cola" or "Coke". Add them so no mention gets missed.

Citation: a source (URL) an AI engine used to build its answer. A **domain citation** means one of your own pages was cited.

Competitors: the brands you benchmark against inside a Brand Report. There's no limit on how many you add.

Domain Coverage: how often a domain is cited across the AI answers in your report.

GEO (Generative Engine Optimization): optimizing your content and brand presence so you appear in AI-generated answers. Think of it as SEO, but for AI.

GEO Audit: checks a page of your website for AI readiness. It has three parts: Crawlability Checker, Content Checker and Query Fan-Out.

Intent Volume: an estimate of how often a type of question is asked across AI engines. Use it to prioritize prompts.

Likelihood to Buy: how often your brand shows up in prompts with purchase intent, like "best tool for X" or "which brand should I choose for Y".

Non-branded prompt: a prompt that doesn't name a brand, such as "best running shoes for marathons". These give the most neutral, competitive picture.

Prompt (search prompt): the real, conversational question someone types into an AI search engine. Prompts are the new keywords.

Prompt Research: finding the questions your audience actually asks AI. OtterlyAI's AI Prompt Research tool generates them for you.

Query Fan-Out: the related questions an AI engine expands a prompt into behind the scenes. Great for spotting content gaps and new prompts.

Recommendations: prioritized, ready-to-act suggestions OtterlyAI generates from your Brand Report data.

Share of Voice: your share of all brand mentions in your tracked prompts, compared with competitors.

Tags: labels you assign to prompts (by product, funnel stage or market) to filter your data.

Workspace: a separate space for each brand or client, all under one subscription.

Want the exact formulas behind every metric? See Brand Report KPI definitions in our Help Center.

How OtterlyAI works

Instead of blue links, people now get one AI-written answer. The question is: **are you part of that answer?** OtterlyAI helps you find out, in three simple steps.

step 1

Prompt Research

Find the questions people ask AI about your industry. Enter a URL, import SEO keywords, or brainstorm with our Prompt Research tool.

step 2

AI Search Monitoring

OtterlyAI runs your prompts every day across all major AI search engines. No manual searching, no guesswork.

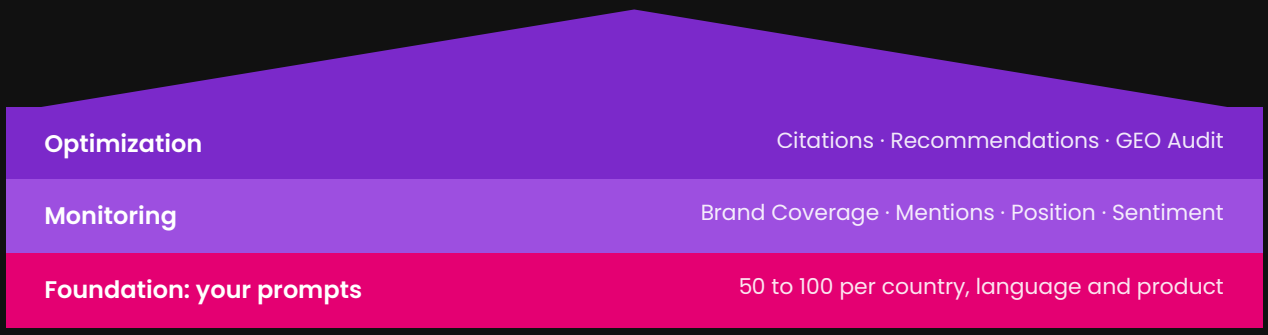
step 3

AI Search Optimization

See who gets mentioned and cited, spot the gaps where competitors appear instead of you, and take action.

Think of it like building a house

Your prompts are the foundation. Everything on top (your visibility scores, competitor data, citations and recommendations) is only as good as the prompts underneath. Get the foundation right and the rest stands firm.



▷ Watch: Unlocking AI Search Success (video 1/7)

▷ Watch: Exploring the interface (2/7)

Prompt Research: the foundation

If there's one thing to get right in OtterlyAI, it's your prompts. A search prompt is the question someone types into ChatGPT, Perplexity or Google AI Overviews. Not a keyword, but a real, conversational question.

What makes a good prompt?

Be conversational

Write prompts the way people speak to AI.

Be specific

Ask industry questions like "What's the best CRM for small B2B sales teams?"

Mix prompt types

Track category, problem-based and comparison questions. Each reveals a different slice of visibility.

Avoid brand names

Non-branded prompts ("best marathon running shoes") surface competitors and alternatives more naturally.

Think by market

AI answers vary by country and language. Set up prompts per market you operate in.

Focus on buying intent

Prioritize middle and bottom of funnel questions. "What is a CRM?" rarely returns a brand.

pro tip

Aim for **at least 50 to 100 prompts** per country, language and product category to get statistically meaningful data. Too few prompts and the numbers won't tell you much.

How to find your prompts

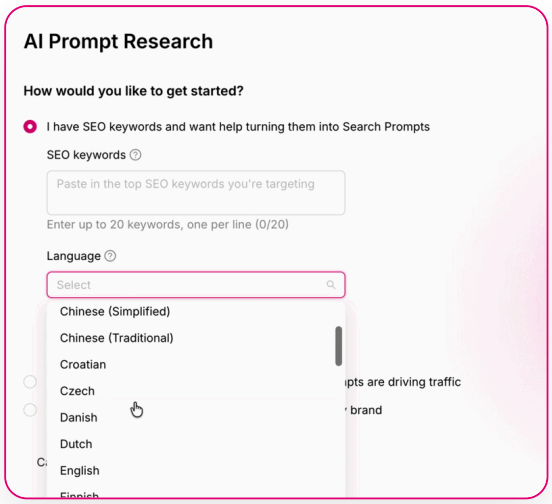
AI engines don't publish what people ask them, so there's no "keyword planner" for AI. These methods, combined, give you a strong starting list.

1. Use the AI Prompt Research tool

Open **AI Prompt Research** in the left menu and choose how to start:

- **SEO keywords:** paste your top keywords and OtterlyAI turns them into conversational prompts, in any language.
- **A URL:** OtterlyAI extracts topics from the page and creates prompt ideas.
- **Brand, domain and industry:** get prompt ideas for your market, including competitors.

Every suggestion comes with an **Intent Volume** estimate so you can prioritize.



2. Convert your Google Search Console queries

Long, question-style queries from Search Console are great prompt candidates, because they come from real traffic.

3. Brainstorm with AI

Try our OtterlyAI PromptFinder custom GPT. Tell it your brand, industry and audience and it suggests prompts instantly.

good to know

- Data is collected from the day you add a prompt. There's no historical data before that.
- Prompt text can't be edited. To reword one, delete it and add a new one (its history won't carry over). Tags and brand report can be changed anytime.
- Use **Tags** (product, funnel stage, market) from day one. They make filtering much easier later.

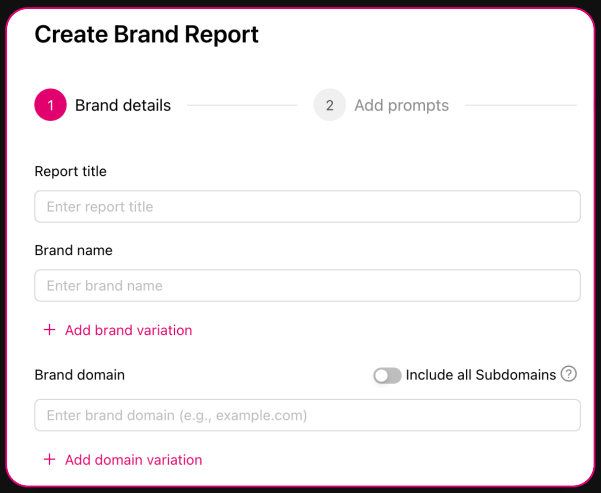
▷ Watch: Mastering Prompt Research (video 3/7)

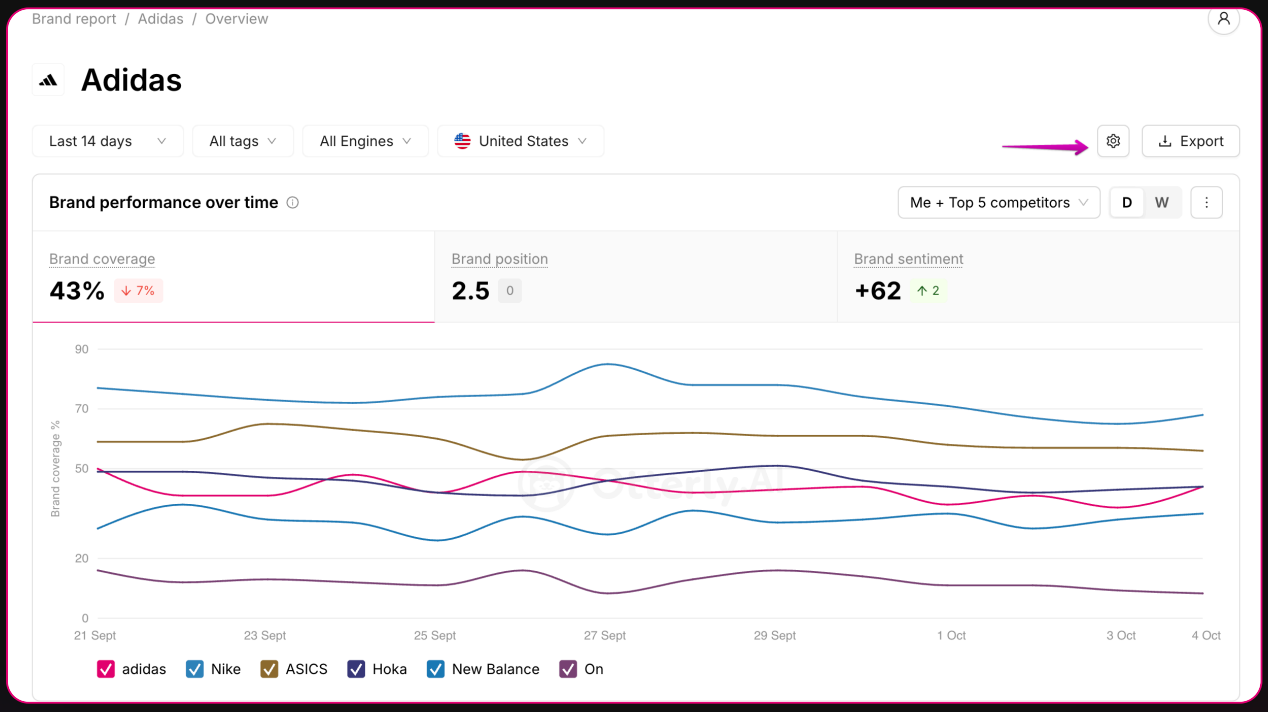
Help Center: finding relevant prompts

Setting up your Brand Report

When you add your first prompts, OtterlyAI creates your first Brand Report automatically. You can create as many additional reports as you like, for example one per brand, product line or market.

1. **Open the Brand Report section** in the left sidebar and click the + icon.
2. **Add your brand name and domain.** Include every brand and domain variation (see next page).
3. **Connect your search prompts.** Prompts must already exist in your account before you can connect them.
4. **Add competitors.** OtterlyAI can suggest them automatically, or add your own. There's no limit.





You can change the brand name, domain, competitors or connected prompts anytime by clicking the **gear icon** in the upper right corner of your Brand Report.

Are you missing mentions of your own brand?

Your Brand Report only finds what you tell it to look for. If you track "OtterlyAI" but an AI answer says "Otterly AI" or just "Otterly", that mention won't count. Not because it doesn't exist, but because the tool looks for exactly what you entered.

Brand variations

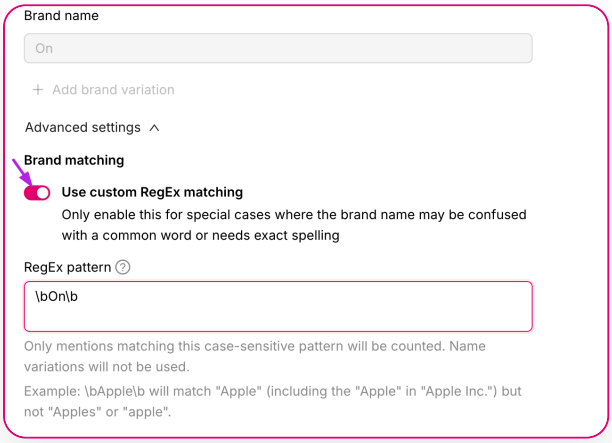
Add abbreviations, spacing variants and product names. Example: Coca-Cola, Coca Cola, Coke.

1. Click the gear icon in your Brand Report.
2. Open the **Brand details** tab.
3. Use **+ Add brand variation** for each version.
4. Click **Save changes**

Domain variations

Add regional or product domains (nike.com, nike.co.uk, nike.de) so all your citations count.

1. Enter your primary domain without https://
2. Toggle **Include all subdomains** to count blog.yourbrand.com and similar automatically.
3. Add other domains under **+ Add domain variation**



Brand name is a common word?

For brands like **On** (also an everyday word), open **Advanced settings** next to the brand name and enable **custom RegEx matching**, for example `\bOn\b`, to avoid false matches.

pro tip

Add name variations for your **competitors** too. The comparison only works if both sides of the picture are complete.

Brand variations **Domain variations**

Reading your dashboard

Forget traffic and backlinks for a moment. OtterlyAI tracks a new set of KPIs built for AI search. Here's what they mean, using Adidas as an example.

Brand Coverage: your main KPI

The percentage of AI answers where your brand appears. A low score means whole conversations in your industry are happening without you.

Adidas had 61% Brand Coverage, so in 39% of tracked AI answers they weren't mentioned at all. That's the gap to close.

Brand Mentions

How many times your brand appeared across all tracked prompts and engines. Every mention is a moment where AI recommended you to someone.

Adidas was mentioned 480 times in the last 30 days.

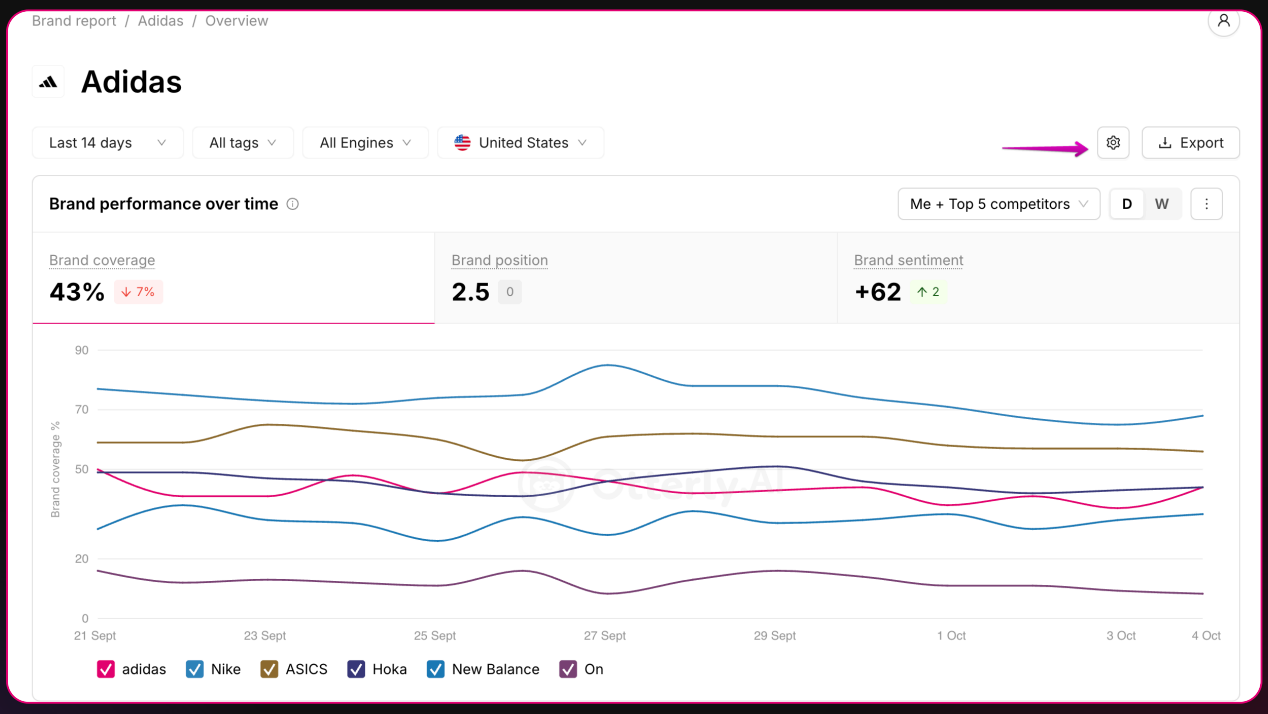
Avg. Brand Position

When AI lists several brands, where do you appear? Position 1 is the first recommendation, and people are more likely to act on it.

Adidas improved from 3.89 to 2.43, a small number that decides whether people see you first.

Brand Sentiment

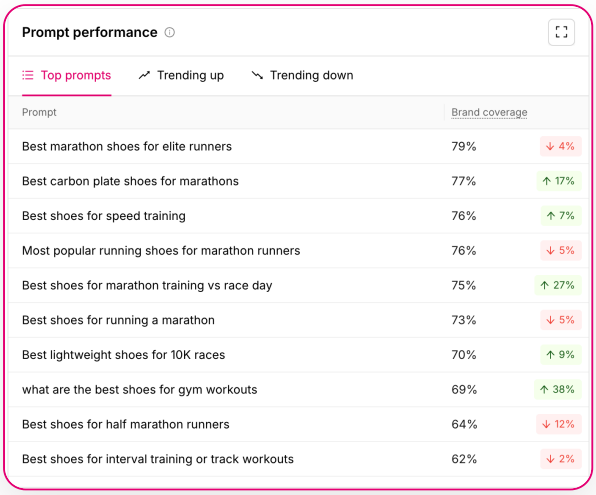
How positively AI describes you (Net Sentiment Score, -100 to +100), benchmarked against competitors.



The real power kicks in when you compare these metrics with competitors side by side. That's where gaps and opportunities become obvious. See exact KPI calculations.

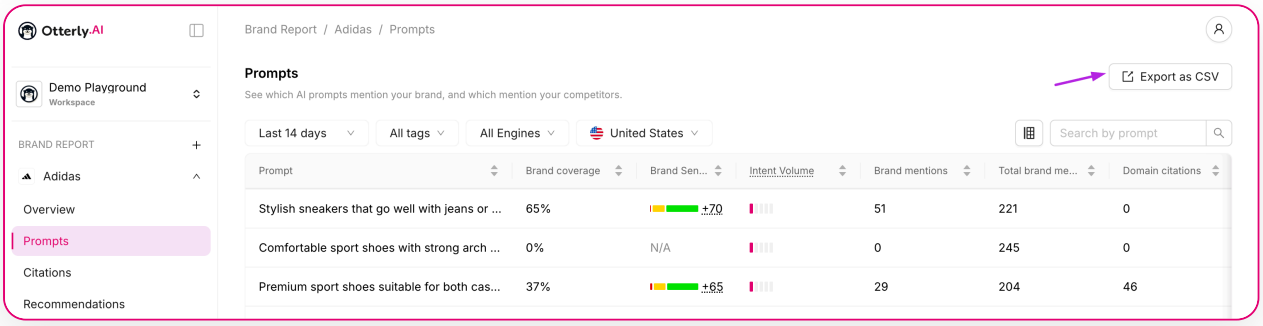
Dig into your individual prompts

Below the main charts, the **Prompt performance** table shows your **Top prompts**, prompts **Trending up** and prompts **Trending down**. The **Prompts** tab lists every prompt with Brand Coverage, Sentiment, Intent Volume, Mentions, Domain Citations, Competitors and more. Customize the columns to see what you need.



Click any prompt to see:

- **Each engine's full response**, word for word, side by side.
- **Which competitors were mentioned**, alongside you or instead of you.
- **The sentiment around your brand**: a strong recommendation, neutral, or something worth investigating.
- **The exact citations** each engine used to build its answer.



The Prompts tab: one row per prompt, with export to CSV in the top right.

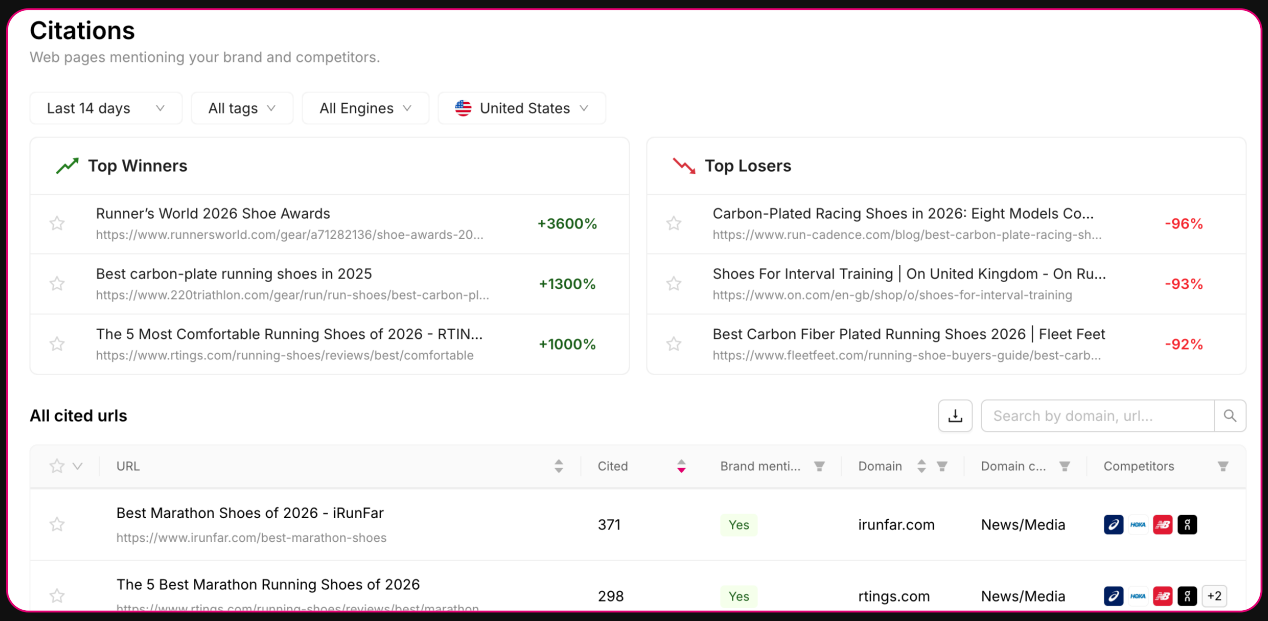
build the habit

Checking individual prompt responses regularly is one of the most useful habits in OtterlyAI. Also note that AI answers change day to day, which is exactly why we monitor daily.

Help Center: how prompt monitoring works

Citations: where AI gets its answers

Ever wonder why some brands keep showing up in AI answers? It usually comes down to **the sources AI trusts**. Get referenced by those sources and your chances of appearing go up significantly. The Citations report is a live map of where authority lives in your industry.



Top Winners & Losers

The cited URLs gaining or losing the most citations versus the previous period. A competitor page climbing? That's your content brief.

Citation details

Click any URL to see its citation count, whether you're mentioned on it, which competitors are, and the prompts it was cited in.

Citations over time

Watch the trend after publishing or optimizing content to confirm you're moving the needle.

Top Winners and Losers rank by percentage change, so a page starting from a low base can jump on just a few citations. Open it and check the actual count before you act.

Turn citations into a plan

Get on high-authority sources

Find sites that appear constantly in AI answers but never reference your brand.

Study competitor citations

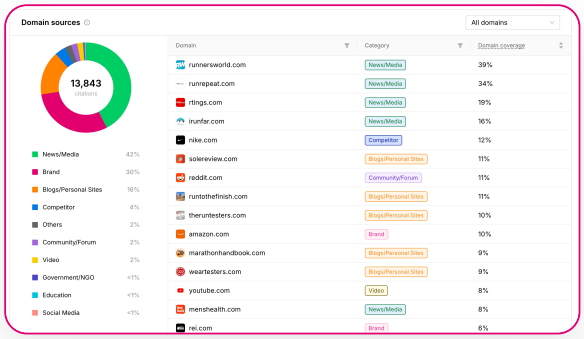
Which pages does AI pull from for competitors? What topics and formats? Build something better.

Turn gaps into content

Cross-reference prompts where you don't appear with their citations for a prioritized content plan.

Domain Sources: which types of sites matter?

The **Domain Categories Distribution** chart shows which types of sources AI uses most in your space: Brand, News/Media, Community/Forum (like Reddit), Blogs, Video, Encyclopedia and more. Click a category to filter the domain table.



- **News/Media dominates?** PR is your number one lever.
- **Blogs and personal sites high?** That's a content partnership signal.
- **Community/Forum strong?** Be authentically present on Reddit and forums.

Aleksandra's favourite move

In Citations, filter by **"Not mentioned"** to see every source AI pulls from where your brand doesn't appear. Then filter by a category that matters, like News & Media, and **export to CSV**. You've just built a PR outreach list from AI data.

▷ Watch: Optimizing your visibility with AI strategies (5/7)

Citations report | Domain Sources

Recommendations: from data to done

Recommendations looks at everything in your Brand Report (citations, competitor visibility, content gaps, prompts where you don't appear) and turns it into **concrete, prioritized next steps**. Find it in the left menu of any Brand Report.

SUGGESTED

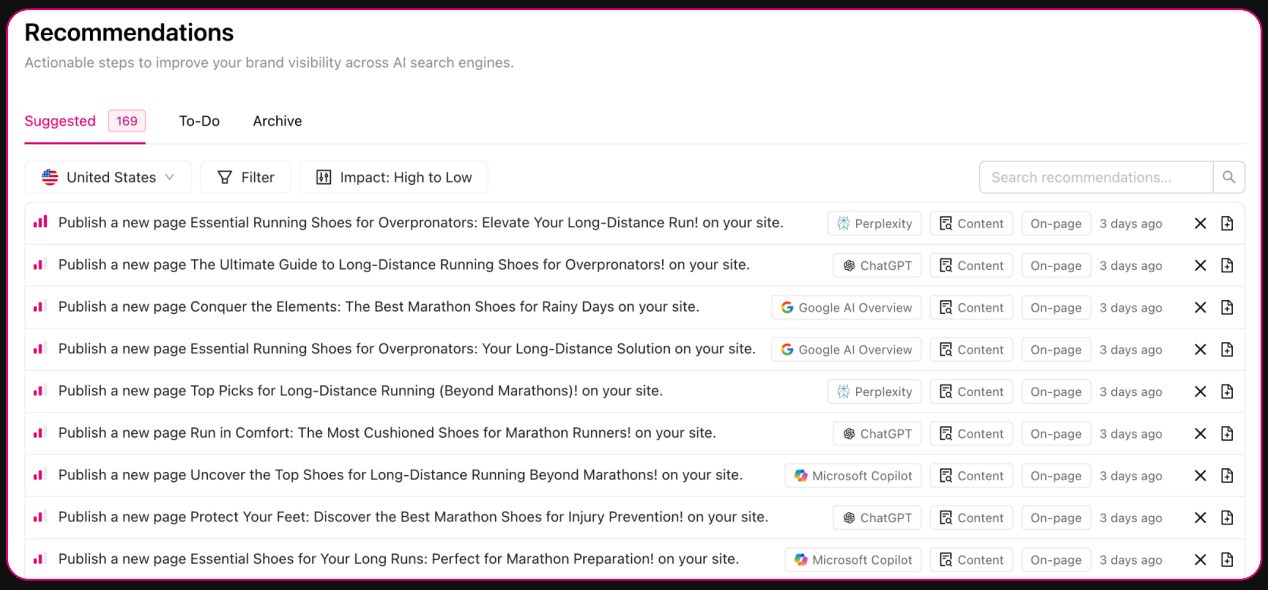
Fresh ideas ranked by impact. Each one shows the **reasoning** behind it and a concrete **suggestion**. Discard what doesn't fit.

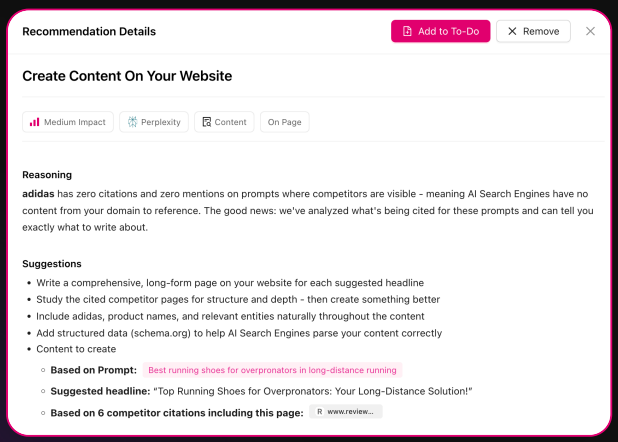
TO-DO

Click **Add to To-Do** on the ones that fit your strategy. Track status and add notes for your team.

ARCHIVE

Mark items complete and they move to Archive, building a record of your AI search optimization over time.





Filter to what matters now

Filter by **AI engine**, **type** (Prompts, Crawlability, Content, Reddit, News & Media, YouTube...), **area** (On-Page, Off-Page) and **impact** (High, Medium, Low).

Use it as your **weekly to-do list**: filter by impact, pick the top five, focus on those.

Watch: Turn AI search data into to-dos

How Recommendations work

GEO Audit: is your website AI-ready?

So far you've seen how AI sees your brand from the outside. Now flip it: is your website set up so AI can **read, understand and recommend** you? That's GEO, Generative Engine Optimization.

Crawlability Checker

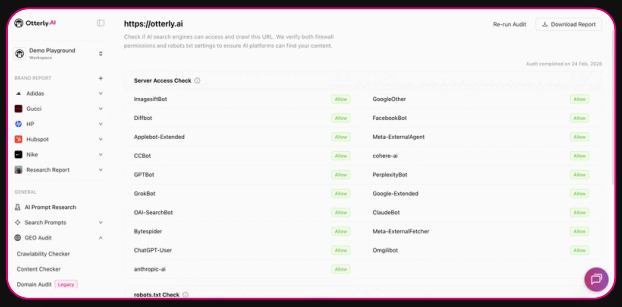
AI engines must be able to access a page before they can cite it. See which bots are allowed or blocked at **server level** and in your **robots.txt**.

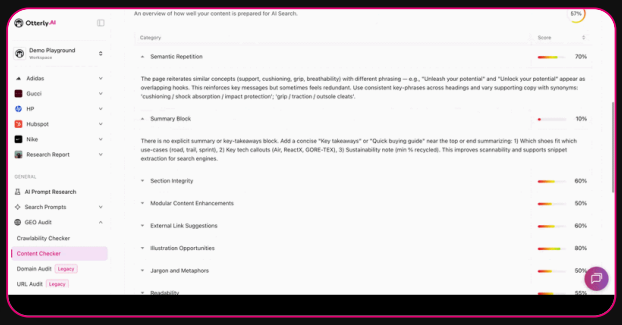
Content Checker

Evaluates how well a page is structured for AI: static vs. dynamic content, **readiness** score and **structured data** (structure, content, metadata, technical).

Query Fan-Out

See the related questions an AI engine expands a prompt into, to find content gaps and new prompts worth tracking.





What score should I aim for? Anything above 51% is good; 60% to 80% is optimal. Each audit checks one page, so start with your most important pages. Download the full report as a PDF from the top right.

Watch: GEO Audit (video 6/7) | What the GEO Audit does

Agent Analytics: your invisible visitors

AI bots visit your website every day to shape the answers AI search engines give your customers. Agent Analytics makes them visible, using your **real server logs**. No estimates, no modeling.

Which bots showed up

ChatGPT, Claude, Perplexity, Google and more, engine by engine.

Which pages they hit

Know what's getting read and what's being skipped.

What kind of visit

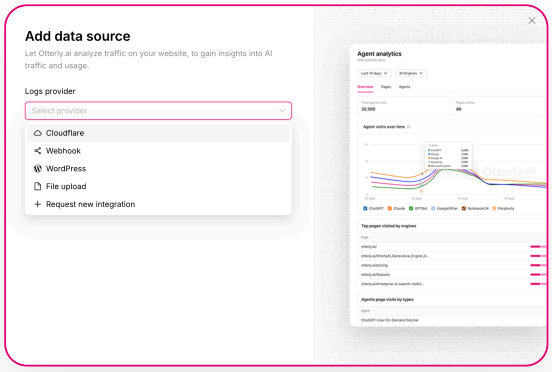
A live user question, a search index crawl or a training scrape.

Connect your data source in a few minutes

Open **Agent Analytics**, click **Connect a data source**, choose your logs provider and follow the steps.

Connector	Best for	Effort
WordPress plugin	WordPress sites	Low
File upload	One-off or historical analysis	Low
Netlify	Sites hosted on Netlify	Low to medium
Webhook	Any custom provider, CDN or proxy	Medium
Cloudflare	Sites fronted by Cloudflare	Medium to high

Live connectors show data from the moment you connect.
Historical data is only available via log file upload.
Available on Standard, Premium and Custom plans.



Not sure which option fits your stack? Ask your web team which hosting or CDN you use, or reach out and we'll help you pick.

Watch: Agent Analytics demo

How to connect your data source

Your data, wherever you work

Your AI visibility data doesn't have to live only in the dashboard. Set it free with the API, the Claude Skill and the Marketplace.

Public API

Brand reports, prompts, citations, recommendations and GEO audits, available programmatically. Pipe them into Looker Studio, Slack, Google Sheets, BigQuery or any automation.

Standard: 2,000 requests/month · Premium: 5,000

Claude Skill

Ask for your data in plain English, no code: "Pull my brand coverage vs. my top 5 competitors over the last 7 days and write a 150-word summary." Setup takes under five minutes.

Marketplace

100+ ready-to-use workflows for brand checks, share of voice, citation gap analysis, GEO audits and prompt research. Many plug into Claude, n8n and Zapier.

MCP Server

A hosted MCP server with read-only tools for Claude Code, Claude Desktop and Cursor. We'll let you know as soon as it's live.

Get your API key

1. Go to **Admin → API Keys** (Admins only).
2. Create a key, name it, choose a workspace and access level (read, or read & write).
3. Copy it right away: you'll only see it once. Keep it private.

Watch: API & Claude Skill · Marketplace · API docs

Built for more brands, clients and teams

Workspaces

Manage multiple brands or clients from one account. Go to **Admin → Workspaces**, click **New Workspace** and assign prompts and GEO Audits. Adjust allocations anytime.

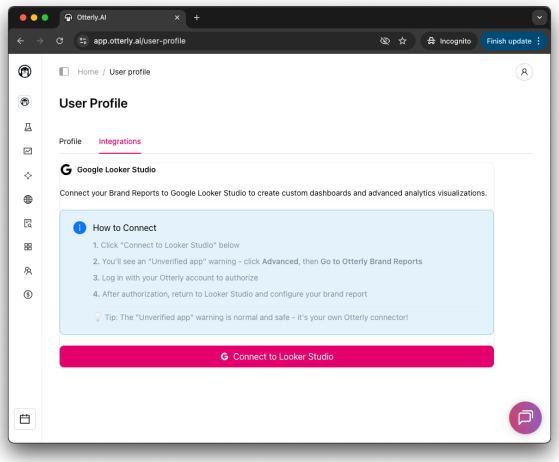
Roles & permissions

Invite colleagues or clients to specific workspaces with the right role, so the right people see the right data.

Permission	Admin	Member	Viewer
View reports, prompts, citations, GEO audits, Agent Analytics; export data	✓	✓	✓
Create reports, manage prompts, run GEO audits, work on Recommendations	✓	✓	-
API keys, workspaces, team members, billing	✓	-	-

Take your data further

- **CSV exports** of prompts, citations, raw AI responses and recommendations, plus **PDF** exports of your Brand Report and GEO Audits.
- **Google Data Studio (Looker Studio) connector:** go to Profile Settings → Integrations and bring AI search data into the dashboards your team already uses.
- **AI referral traffic:** use our Google Analytics template to follow the journey from AI mention to website visit.



Want to go deeper? Reply to any of our emails and we'll send you our **40-page optimization deck** with GEO best practices and step-by-step instructions.

Watch: Resources and tools (7/7) | Export options | Data Studio

Is your visibility improving?

You've got data, gaps and a plan. Here's how to know your strategy is working. Check these four metrics every month.

Brand Coverage

Are you appearing in more prompts than last month? If coverage is 40%, you're absent from 60% of AI conversations about your industry. It's the first number to check.

Share of Voice

Are you gaining ground on competitors? If you account for 30% of all brand mentions across your prompts, your Share of Voice is 30%.

Likelihood to Buy

Are you showing up more in high-intent prompts like "best tool for X"? These are the moments someone is about to decide.

Net Sentiment Score

Is the way AI talks about you improving? Ranges from -100 to +100, benchmarked against competitors.

If all four are moving in the right direction, you're winning. If one is lagging, make it your focus for next month.

Exact KPI calculations



Best practices from our Customer Success team

The customers who see the fastest results all share a few habits. These are the moves we recommend every time.

Investigate your sentiment

Drill into individual prompts and look at the sentiment attributes behind the score. AI might praise your product but flag pricing or durability. That's feedback you can act on.

Find where you're invisible in Citations

Filter Citations by "Not mentioned", then by a key category like News & Media. Export the list and you've got a PR outreach plan.

Know which source category matters most

Check the Domain Categories Distribution chart. If News & Media dominates, PR is your top lever. If blogs are high, that's a content signal.

Use Recommendations as your weekly to-do list

Start there instead of diving into raw data. Filter by impact, pick the top five actions, and focus on those for the week.

Keep your prompt library fresh

Review prompts monthly. Add new ones from Query Fan-Out and Search Console, and make sure each market has 50 to 100 prompts.

Your first-week checklist

- ☐ Add 50 to 100 non-branded prompts
- ☐ Add brand and domain variations
- ☐ Run a GEO Audit on your key pages
- ☐ Tag prompts by product, funnel or market
- ☐ Add competitors (and their variations)
- ☐ Connect Agent Analytics

Your OtterlyAI routine

WEEKLY

Work through your top 5 Recommendations. Check prompts Trending down and read their AI answers.

MONTHLY

Review Brand Coverage, Share of Voice, Likelihood to Buy and Sentiment. Refresh your prompt list.

QUARTERLY

Re-run GEO Audits on key pages, review Agent Analytics and update your Citations outreach list.

Small, consistent actions are what move the needle in AI search. Pick one of these and try it this week.

Free GEO tools

On top of everything in your account, we've built a collection of free tools for every stage of your GEO work: prompt research, content checks, crawlability, referral traffic tracking and industry benchmarks.

CustomGPT for Prompt Research

A custom AI assistant trained for GEO prompt research. Tell it your brand, industry and audience and it generates relevant prompts instantly.

Open PromptFinder

GEO Landing Page Creator

Found prompts where you don't appear at all? Build a landing page designed to target that prompt, with the structure and signals AI needs.

Open the creator

The GEO Guide

Our 70-page guide to Generative Engine Optimization, from strategy to content and technical setup.

Download the guide

All free GEO tools

Your extended toolkit, free and open whenever you need it.

Explore all tools



Contact

Let's stay in touch!

Questions, ideas, or just want a second pair of eyes on your account? We're here for you.



your go-to otter

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"I'm here to help you become successful with OtterlyAI. Hit reply to any of my emails and I'll take a look at your account with you. I answer every single one!"

Book your onboarding session

Free and fast. Our product specialists set things up for your goals and make sure you get real value from day one. otterly.ai/onboarding

Live chat

Open the chat bubble on any page of OtterlyAI for a quick answer.

Email

Reply directly to any of our onboarding emails, or write to support@otterly.ai. We answer every single one.

Help Center

Step-by-step articles for every feature: help.otterly.ai

Video onboarding guide

A complete 7-part walkthrough of the platform: help.otterly.ai/onboarding-guide

