

SAMPLE · fictional brand, illustrative findings, not client results

When a RevOps buyer asks an AI which note-taker syncs to HubSpot, *who gets named, and why not Northline?*

A format demo of the Snapshot brief: you plus three competitors, the prompt families buyers use, who the answer engines name instead, and the sources shaping those answers.

PREPARED FOR	Northline Sync FICTIONAL
CATEGORY	B2B async meeting notes → CRM sync EXAMPLE
COMPETITORS REVIEWED	LedgerNote · LoopBrief · StackMinutes FICTIONAL
RESEARCH WINDOW	2026-09-08 → 2026-09-12 ILLUSTRATIVE
ENGINES NOTED	ChatGPT · Perplexity · Google AI Overviews
CITATION STANDARD	Every factual claim carries a source URL and access date
WHAT IT IS NOT	No rankings, citation-rate percentages or outcome guarantees

HOW TO READ THE MAPS IN THIS BRIEF

 NAMED The engine names or links the brand in its answer.	 ABSENT The brand is missing from an answer where a buyer would expect it.	 SUBSTITUTED A competitor or a third-party source fills the space instead.
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01 Executive summary

ILLUSTRATIVE · every finding on this page is an example of the format

DECISION QUESTION EXAMPLE

When a RevOps buyer asks which async meeting-notes tools sync cleanly to HubSpot, what narrative do answer engines surface, which peers or sources shape it, and what should Northline investigate next?

FINDINGS EXAMPLE

- On comparison-style prompts, the example peer LedgerNote appears more often than Northline in this sample run.
- Category-definition prompts cite review and roundup domains more than owned product pages.
- Implementation prompts surface community threads that omit Northline’s CRM field-mapping docs.
- These are illustrative patterns for the Snapshot format, not rankings, citation rates or client outcomes.

WHAT SNAPSHOT SCOPE INCLUDES (THE REAL PRODUCT)

You + up to 3 competitors · async PDF · URL and access-date citations on factual claims
Prompt-family map · substitution notes · qualitative action backlog · 5–7 business days after complete intake
No citation guarantees · no share-of-answer percentages · no live workshop on this SKU

02 Scope & method

Fields a real Snapshot brief fills · example values below

RESEARCH PARAMETERS ILLUSTRATIVE

BRAND URL	https://northline-sync.example.com RESERVED EXAMPLE
BUYER / ICP	RevOps lead at a 20–80 person B2B SaaS company EXAMPLE
GEOS / LANGUAGE	US English ILLUSTRATIVE
COMPETITORS	LedgerNote · LoopBrief · StackMinutes FICTIONAL
PROMPT FAMILIES	Definition · Shortlist · Comparison · Implementation
LIMITATION NOTE	Small prompt set; answers vary by personalisation and date

HOW A REAL BRIEF WORKS

- 01 A paid Snapshot records the prompt text, engine, access date and the citation URLs observed.
- 02 This sample invents no live URLs as proof. Reserved example.com links stand in for citation slots.
- 03 Interpretation is kept separate from observation. Priority labels are planning choices, not ROI scores.
- 04 Do not read the sample’s absence or presence language as a measurement of any real brand.

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03 Prompt-family map

ILLUSTRATIVE worksheet · Snapshot depth (you + 3 peers)

ID	FAMILY	EXAMPLE PROMPT	BRAND	WHO APPEARS (EXAMPLE)	CITE SLOT
P-01	Definition	best async meeting notes tools for HubSpot	○ Absent*	LedgerNote; category roundups	ex.com/a
P-02	Shortlist	meeting notes CRM sync shortlist mid-market	● Named*	LoopBrief, LedgerNote	ex.com/b
P-03	Comparison	LedgerNote vs Northline Sync for RevOps	● Named*	Both + StackMinutes sidebar	ex.com/c
P-04	Implement	map meeting notes fields to HubSpot deals	○ Absent*	Community thread; LoopBrief docs	ex.com/d
P-05	Alt / switch	alternatives to LedgerNote for async notes	○ Absent*	LoopBrief, StackMinutes	ex.com/e

* SAMPLE labels only: fictional observation markers, not real audit results. “Named” means the brand appears in the answer. In a real Snapshot the Cite slot column holds a live URL and access date (YYYY-MM-DD). Here, reserved example placeholders show where citations would sit.

LEGEND

● NAMED The engine names or links the brand in its answer.	○ ABSENT The brand is missing from an answer where a buyer would expect it.	ⓘ SUBSTITUTED A competitor or a third-party source fills the space instead.
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04 Substitution & source roles

Example peer and source patterns · qualitative only

4.1 SUBSTITUTION TABLE ILLUSTRATIVE

THEME	IF THE BRAND IS ABSENT, WHAT MAY APPEAR?	VERIFY	LANE
CRM sync claims	LedgerNote comparison pages (example)	Owned vs third-party pages	Content / SEO
Category definition	Roundup and review domains (example)	Update dates, incentives	PR / listings
Field mapping	Community threads + LoopBrief docs	Primary docs URLs	Docs / GEO
Switch intent	StackMinutes alternative lists (example)	Accurate profiles	Listings hygiene

4.2 SOURCE-ROLE TAXONOMY (USE ON REAL URLS)

OWNED	Docs, product and comparison pages the brand controls.
INDEPENDENT	Reviews, analysts and publications not controlled by the brand.
COMMERCIAL	Vendor comparison and marketplace pages. Check incentives.
COMMUNITY	Threads reflecting lived experience. Engage helpfully, never astroturf.

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05 Action backlog

Qualitative priorities · planning order, not ROI

PRI	OBSERVATION TO VERIFY (EXAMPLE)	PROPOSED ARTEFACT	OWNER	DONE WHEN
H	Comparison prompts omit field-mapping depth	Owned comparison page + FAQ	Content	Live URL + entity line
H	Roundups list peers, not Northline	Listing hygiene pack (3 sites)	Founder	Profiles accurate + dated
M	Implementation prompts cite community only	Public field-map doc + examples	Eng / Docs	Doc linked from product
M	Alternative lists exclude Northline	One accurate alternatives-page submission	Marketing	Page shows correct ICP
L	Entity description inconsistent	One-sentence entity lock	Founder	Same line on home + docs

Traffic lifts, citation rates and “share of AI answers” are left out unless they were measured for the brand.

06 What a real Snapshot adds

- Confirmed brand, competitors, geos, engines and prompt set from your intake
- Live URL and access date on every factual claim
- A clear split: observation, interpretation, recommendation
- A limitation section: sample size, personalisation, model drift
- Your approval before any public use of your name or outcomes

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Next steps

Useful even if you never buy · the sample ends here

FREE FIRST

Run the AI Answer Visibility Checklist yourself in about 30 minutes. Date every check. It is prompts, engines and a fix order, with no rankings promise.

FREE CHECKLIST

eastwestkonnex.gumroad.com/l/ai-answer-visibility-checklist

WANT THIS RESEARCH DONE FOR YOUR BRAND?

Messaging Snapshot · \$149 · you + 3 competitors · cited PDF · 5–7 business days after complete intake

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GEO/AEO MAP · \$249

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AGENCY PACK · \$449

White-label, 1 client + up to 5 competitors · buy.stripe.com/7sYaEZaVY5y4b5s3mze7m02

ALL BRIEFS

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Not sure which brief fits? Send your category and competitor list to morpheusqilee@gmail.com.

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