

Prepared for **Pipewise** · a CRM for small and mid-market sales teams

AI Visibility Audit and Fix Plan

A worked example of a MentionShare audit. It shows where AI answer engines place a B2B SaaS brand today, what the engines get wrong, and the prioritized fix plan with ready-to-use assets. Pipewise and the competitor names are illustrative; the method, scoring, and deliverable are exactly what a client receives about their own company.

CHATGPT

CLAUDE

PERPLEXITY

GEMINI

GOOGLE AI OVERVIEWS

Illustrative sample · Tested July 2026 · Prepared by MentionShare.com · Checked by Laurynas Leskauskas

What you are seeing: the exact report you would receive. In your version, Pipewise becomes your company, the competitors become your real rivals, and every finding, score, and fix asset is about you and your own data.

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Scope

Engines in scope: ChatGPT, Claude, Perplexity, Gemini, Google AI Overviews. This sample walks through a full audit for an illustrative client, Pipewise, a CRM for small and mid-market B2B sales teams. Test window: July 2026.

About this sample. Pipewise and the competitor brands shown here are fictional stand-ins used to demonstrate the deliverable. The findings, method, scoring approach, and fix assets mirror exactly what we produce for a paying client, whose report is about their real company and their real data.

Scope note. This sample shows the Claude-engine panel plus the full remote diagnostic. In a live engagement the wider multi-engine panels (ChatGPT, Perplexity, Gemini, and AI Overviews) run in full, and every provisional number is recomputed as those land.

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1. Executive summary

Overall AI Visibility Score: 68 / 100. Grade: Emerging presence.

You are a strong product that AI engines already name, but they name you second and they quote wrong facts about you. The losses are accuracy and consistency, which are the most fixable category. No score cap applies: nothing blocks the engines from reading your site, and you are mentioned across the buying questions.

The three most damaging findings:

1. When buyers ask AI what Pipewise costs, the engines quote your retired \$39 Growth price from an old pricing page instead of your current \$49. Your own surfaces state three different Growth prices at once: \$39 on the old page that still resolves, \$49 on the live page, and \$45 on your G2 listing (Q06, ACC-04, E3).
2. The directories AI tools quote carry wrong facts about you: Capterra says you have no free trial and start at \$29, Software Advice still lists your retired Solo/Team/Business plan names, GetApp runs on 18 reviews and a generic description, and Crunchbase and Tracxn name different founders on a profile you have not claimed (ACC-01, ACC-02, ACC-03, ACC-05, E3).
3. On the questions that decide deals, competitors get named first: for "best CRM for small sales teams," the engines lead with Verazo, Idenwell, and Nordvale, place Pipewise in the top 5 but never first, and Gemini leaves you out entirely (S1, S3, E1).

Your first three moves: FIX-01 Retire the old pricing pages and reconcile the Growth price (Marketing, quick win). FIX-02 Fix the founder record and claim your database profiles (Founder and Marketing, quick win). FIX-03 Correct the four wrong directory listings (Marketing, quick win).

90-day outlook. Every finding above lives on a surface you control or can correct: your own pages, your directory profiles, and articles that cite you. Fixes to those show up in AI answers within days to weeks of a recrawl. Ship the first three moves and buyers stop being told a wrong price and a missing trial, which is the fastest path from named-second to named-first.

Method: buyer questions run on the Claude engine with live web search, tested July 2026. Results are a rigorous directional snapshot rather than a census; the wider multi-engine panels are pending, which is why every provisional number here is recomputed in a live engagement.

2. Score at a glance

Component	What it means for you
AI share of voice	Present on every buying question tested, but named after Verazo and Idenwell; first place is not yet yours on any discovery question
Accuracy of AI claims	Seven distinct wrong or conflicting claims about you are circulating, five of them Important severity, most about price and trial
How AI frames you	Mostly positive: easy to set up, good value, strong support; recurring hedges on reporting depth and enterprise readiness
Crawler access	Content is fully readable by AI bots, which is the big one; robots.txt, edge rules, and the sitemap need a 10-minute inside verification (FIX-04)
Structured data	No Organization or Product schema found in your pages; cross-source facts about you demonstrably disagree
Page structure	Strong: real HTML tables, a question-formatted FAQ, dense specifics; page openings lead with slogans before answers
Positioning clarity	Clear category and FAQ definition; retired plan names and an unproven "number one" claim dilute it
Content coverage	Good: four live comparison pages and an honest alternatives guide; no pillar guide for your category's core questions
Off-site presence	Strong on G2; thin or wrong on Capterra, TrustRadius, and three of the cited best-CRM listicles

Overall 68 / 100 provisional. Grade: Emerging presence.

3. Engine ranking snapshot

Where Pipewise ranks today when buyers ask, engine by engine. This is the single view that shows what an AI answer looks like from the buyer's side.

#	Buyer question	ChatGPT	Perplexity	Google AI Overviews	Gemini	Claude
S1	Best CRM for small sales teams	Top 5	Top 6	Top 4	Not ranked	Top 3
S2	Best CRM for B2B startups	Top 4	Top 5	Not ranked	Top 7	Top 4, named for startups
S3	Verazo alternatives	Top 3	Top 4	Top 3	Top 5	Top 3
S4	Best affordable CRM 2026	Top 6	Top 5	Top 5	Not ranked	Top 4
S5	How much does Pipewise cost	Answered from the stale \$39 page	Answered, correct	No AI answer shown	Answered, outdated price	Answered correctly, but retrieved from your outdated pricing page

How to read it. You hold a stable top-5 presence on the buying questions, with Claude your strongest engine (twice top 3) and Gemini your visible gap (twice not ranked). Row S5 shows the stale-price problem FIX-01 removes: three of five engines answer your pricing question wrong or from an old page. Getting from top 5 to top 3 is an accuracy and off-site job, not a product one.

Illustrative sample. In a delivered report every cell is a recorded, screenshotted run, and the wider multi-engine panels are run in full under the standard protocol.

4. Program view

#	Action	Owner	Effort	Lane
This week				
FIX-01	Retire the stale pricing pages and reconcile the Growth price	Marketing + Developer	Quick win	Data hygiene
FIX-02	Fix the founder record and claim Crunchbase and CB Insights	Founder + Marketing	Quick win	Data hygiene
FIX-03	Correct the four wrong directory listings	Marketing	Quick win	Data hygiene
FIX-04	Verify and publish the AI crawler policy	Developer	Quick win	Technical access
FIX-05	Publish llms.txt	Developer	Quick win	Technical access
FIX-06	Ship the canonical numbers sheet and deploy it site-wide	Marketing	Quick win	Data hygiene
This month				
FIX-07	Deploy Organization schema with a complete sameAs graph	Developer	Quick win	Technical access
FIX-08	Rebalance the review footprint: Capterra and TrustRadius velocity	Marketing	Medium (recurring)	Off-site and links
FIX-12	Rewrite key page openings answer-first	Marketing	Quick win	Content
FIX-13	Publish the small-team CRM pillar guide	Marketing	Medium	Content
FIX-14	Publish answer-first FAQ blocks with schema	Marketing	Quick win	Content
This quarter				
FIX-09	Listicle gap outreach with the 2026 benchmark data as the give	Founder + Marketing	Medium (recurring)	Off-site and links
FIX-10	Publish the Small-Team Sales Benchmark as a named annual data asset	Founder + Marketing	Project	Content
FIX-11	Wikidata cleanup and the Wikipedia evidence file	Marketing	Medium	Off-site and links
FIX-15	Polish batch	Mixed	Quick wins	Mixed

5. Fix plan

FIX-01 · Retire the stale pricing pages and reconcile the Growth price

Data hygiene · Impact: High · Effort: Quick win · Owner: Marketing + Developer

The problem. You have two pricing pages live at once, and AI tools are reading the old one with last year's prices.

Why this matters to you. Engines answer pricing questions from whatever page they retrieve, and in this sample three of five engines quoted your retired /pricing-2025/ page where Growth is \$39, not your current \$49. Your own surfaces state three Growth prices: \$39 on the old page, \$49 on the live page, \$45 on your G2 listing (Q06, ACC-04). A buyer comparing you to Verazo gets a number that is wrong in both directions depending on which page the AI hit.

Do this

1. 301 redirect <https://pipewise.com/pricing-2025/> and <https://pipewise.com/plans/> (and any earlier variants) to <https://pipewise.com/pricing/>.
2. Confirm one true Growth price and use it everywhere: the plan card, the FAQ, and the comparison pages.
3. Update the G2 pricing widget (currently Starter \$19, Growth \$45, Scale \$85) to match.

Ready to use (drop-in replacement FAQ answer):

Pipewise pricing is per user, per month, billed monthly or annually. Starter is \$19, Growth is \$49, and Scale is \$89 per user per month; Enterprise is custom. Every plan includes a 14-day free trial with no card required, and annual billing saves two months.

Done when. Both old URLs return 301 to /pricing/, and the same Growth figure appears on the plan card, the FAQ, the comparison pages, and the G2 widget.

Depends on: None

FIX-02 · Fix the founder record and claim Crunchbase and CB Insights

Data hygiene · Impact: High · Effort: Quick win · Owner: Founder + Marketing

The problem. The big company databases cannot agree who founded Pipewise, and one of your profiles is sitting unclaimed.

Why this matters to you. Crunchbase, CB Insights, and Tracxn are databases that AI tools, journalists, and investors pull facts from, and right now they contradict each other: Crunchbase lists Elena Vasquez as founder, CB Insights names Daniel Okafor as CEO, and Tracxn credits Marta Reyes (ACC-05). CB Insights also shows your profile as unclaimed. When sources disagree, AI guesses, and buyers get told the wrong facts about who runs the company they are about to trust with their pipeline.

Do this

1. Claim the CB Insights profile and correct leadership, description, and founding details.
2. Submit the leadership correction to Tracxn, ZoomInfo, and 6sense (6sense also shows 1,200 customers against your published 3,000+, ACC-07).
3. Verify Crunchbase leadership and the founding year match your own About page.

Ready to use (corrections table):

Surface	Field	Currently shows	Correct value
CB Insights	Profile status	Unclaimed	Claimed by Pipewise
CB Insights / Tracxn / Crunchbase	Founder and CEO	Conflicting: Elena Vasquez vs Daniel Okafor vs Marta Reyes	Elena Vasquez, co-founder and CEO; Daniel Okafor, co-founder and CTO
All	Founded	2018 / 2019 / 2020 across sources	2019

Done when. CB Insights shows a claimed profile, and Crunchbase, CB Insights, Tracxn, and Wikidata state the same founders and founding year.

Depends on: None

FIX-03 · Correct the four wrong directory listings

Data hygiene · Impact: High · Effort: Quick win · Owner: Marketing

The problem. Four software directories are telling AI tools wrong things about you: no free trial, the wrong price, and plans you retired.

Why this matters to you. These directories show up in the sources AI tools quote when buyers ask about you or compare you, and they are wrong in ways that cost deals: Capterra states "Pipewise does not offer a free trial" and "starts at \$29" (ACC-01); Software Advice still sells your retired Solo, Team, and Business plans (ACC-02); GetApp runs on 18 reviews and a generic description; SoftwareSuggest lists you under "Lead Management" instead of CRM (ACC-03). A buyer who reads "no free trial" moves on before they ever reach your site.

Do this

1. Submit corrections to each platform: a 14-day free trial with no card exists, pricing is published from \$19 per user per month, category is CRM, current plans are Starter, Growth, Scale, and Enterprise.
2. Where a platform resists edits, use its vendor-claim flow first, support ticket second.
3. Log each correction date; these feed the day-30 re-test.

Ready to use (outreach template, under 100 words):

Subject: Listing correction for Pipewise

Hello, I manage the Pipewise vendor profile. Our listing shows outdated details. Corrections: Pipewise offers a 14-day free trial with no card required; pricing is published at pipewise.com/pricing from \$19 per user per month (Starter), \$49 (Growth), \$89 (Scale); category is CRM, not Lead Management; current plans are Starter, Growth, Scale, and Enterprise, and the Solo, Team, and Business plans are retired. Happy to verify ownership. Thank you.

Done when. All four listings show the trial, the published price, the correct category, and the current plan names.

Depends on: None

FIX-04 · Verify and publish the AI crawler policy

Technical access · Impact: High · Effort: Quick win · Owner: Developer

The problem. We could not confirm from outside whether every AI bot is allowed to read your site; a ten-minute check on your side settles it.

Why this matters to you. The good news first: your pages are fully readable by AI bots that cannot run JavaScript, which is the hardest part and already solved. Three things we could not confirm from outside: robots.txt (the small public file that tells bots what they may read), whether your firewall or CDN quietly blocks AI bots before they reach that file, and the sitemap reference (T-01, T-02, T-04 in E6). Ten minutes inside settles all three.

Do this

1. Open <https://pipewise.com/robots.txt> and check every AI bot against the reference below; confirm no blanket Disallow sits above the allows.
2. In your CDN or firewall dashboard, confirm no AI-bot blocking rule is active; test with `curl -A "OAI-SearchBot" https://pipewise.com/pricing/` and the other agent strings, expecting 200 with full HTML.
3. Confirm robots.txt carries the Sitemap line and that the sitemap covers the comparison and pricing pages.

Ready to use (target robots.txt, preserve any deliberate training-bot blocks you have made):

```
# Answer and agent crawlers: required for AI citations
User-agent: OAI-SearchBot
Allow: /

User-agent: ChatGPT-User
Allow: /

User-agent: Claude-SearchBot
Allow: /

User-agent: Claude-User
Allow: /

User-agent: PerplexityBot
Allow: /

User-agent: Perplexity-User
Allow: /

# Search crawlers: feed Google AI Overviews, Copilot, and parts of ChatGPT search
User-agent: Googlebot
Allow: /

User-agent: bingbot
Allow: /

# Training crawlers: a separate, deliberate content-rights choice
User-agent: GPTBot
Allow: /

User-agent: ClaudeBot
Allow: /

Sitemap: https://pipewise.com/sitemap_index.xml
```

Done when. Every listed bot string returns 200 with full HTML on the pricing and comparison pages, and robots.txt matches the intended policy.

Depends on: None

FIX-05 · Publish llms.txt

Technical access · Impact: Low · Effort: Quick win · Owner: Developer

The problem. Your site has no llms.txt, a simple text file some companies now publish as a summary written for AI tools.

Why this matters to you. No llms.txt was found for pipewise.com in any index (confirm with a direct fetch). It costs minutes and doubles as a clean machine-readable summary of who you are and where your key pages live, which forces the positioning consistency the rest of this plan depends on.

Do this

1. Save the file below to the web root as /llms.txt.
2. Re-check it quarterly alongside the FIX-06 numbers sheet.

Ready to use

```
# Pipewise

> Pipewise is a CRM for small and mid-market B2B sales teams,
> founded in 2019. Teams use it to manage pipeline, automate
> follow-up, and forecast revenue, with a 14-day free trial and
> plans from $19 per user per month.

## Product
- [Product overview](https://pipewise.com/product/): Pipeline, automation, and reporting for sales teams
- [Pricing](https://pipewise.com/pricing/): Starter $19, Growth $49, Scale $89 per user per month; 14-day free trial
- [Integrations](https://pipewise.com/integrations/): 200+ apps including email, calendar, and helpdesk

## Compare
- [Pipewise vs Verazo](https://pipewise.com/compare/verazo/): Feature and pricing comparison
- [Pipewise vs Idenwell](https://pipewise.com/compare/idenwell/): For growing sales teams
- [Pipewise vs Nordvale](https://pipewise.com/compare/nordvale/): For small teams on a budget

## Company
- [About](https://pipewise.com/about/): Team, founding, and customers
- [Security](https://pipewise.com/security/): SOC 2 Type II, GDPR, data residency
- [Blog](https://pipewise.com/blog/)
```

A note on llms.txt: adoption is growing but no major AI engine has committed to reading the file, and current data shows no measurable citation benefit from having one. We include it because it costs minutes, carries no risk, and doubles as a clean machine-readable summary of your company.

Done when. The file resolves at /llms.txt and matches the FIX-06 canonical numbers.

Depends on: FIX-06 for the numbers it states

FIX-06 · Ship the canonical numbers sheet and deploy it site-wide

Data hygiene · Impact: High · Effort: Quick win · Owner: Marketing

The problem. Your own pages disagree with each other on basic numbers, like how many teams use you and how many apps you integrate with.

Why this matters to you. Your own surfaces disagree, which invites engines to guess: the homepage states 3,000+ sales teams while your Verazo comparison page states over 2,000 companies and 6sense lists 1,200; the homepage states 200+ integrations while your docs state 150+; the Growth price varies per FIX-01 (E3 rows ACC-04, ACC-08, ACC-09).

Do this

1. Confirm the single true value for each fact below.
2. Sweep the site (home, pricing, comparison pages, about) and external profiles to that one value each.
3. Keep the sheet as the source of truth for FIX-05 and FIX-07 and re-verify quarterly.

Ready to use (canonical numbers sheet):

Fact	Values currently in circulation	Canonical value
Customers	3,000+ (home) vs over 2,000 (compare page) vs 1,200 (6sense)	[CONFIRM]
Integrations	200+ (home) vs 150+ (docs)	[CONFIRM]
Growth price	\$39 / \$49 / \$45	\$49 per user per month
Founded	2018 / 2019 / 2020	2019
Free trial	14 days, no card	14 days, no card

Done when. Site search finds one value per fact, and the external profiles from FIX-02 and FIX-03 match it.

Depends on: None

FIX-07 · Deploy Organization schema with a complete sameAs graph

Technical access · Impact: Medium · Effort: Quick win · Owner: Developer

The problem. Your site never tells machines, in the standard machine-readable way, that pipewise.com and your profiles are all one company.

Why this matters to you. Organization schema (a small block of code stating company facts in a format machines read directly) is how your site tells AI that this website and these social and directory profiles are the same company. You have none, and with your third-party records contradicting each other (FIX-02), machines have nothing official to reconcile against (T-05). This is the block of code that makes a knowledge panel possible.

Do this

1. Deploy the block below sitewide in the base template.
2. Validate at validator.schema.org; confirm each sameAs URL is yours and live.

Ready to use

```
{
  "@context": "https://schema.org",
  "@type": "Organization",
  "name": "Pipewise",
  "url": "https://pipewise.com/",
  "logo": "https://pipewise.com/assets/pipewise-logo.png",
  "foundingDate": "2019",
  "description": "Pipewise is a CRM for small and mid-market B2B sales teams.",
  "sameAs": [
    "https://www.crunchbase.com/organization/pipewise",
    "https://www.linkedin.com/company/pipewise/",
    "https://twitter.com/pipewise",
    "https://www.g2.com/products/pipewise/reviews",
    "https://www.capterra.com/p/pipewise/",
    "https://www.wikidata.org/wiki/Q0000000"
  ]
}
```

Done when. The block validates with zero errors and appears in the raw HTML of every page.

Depends on: FIX-06 for the description numbers

FIX-08 · Rebalance the review footprint: Capterra and TrustRadius velocity

Off-site and links · Impact: High · Effort: Medium, recurring · Owner: Marketing

The problem. Your reviews look excellent on G2 and thin or mixed everywhere else AI tools check.

Why this matters to you. Engines cross-check trust across platforms, and yours diverge: G2 4.7 with a Momentum Leader badge against Capterra 4.2 on 18 reviews, a near-empty TrustRadius profile, and no recent reviews on either in six months (Q04, E1). The weakest cited surface sets your ceiling on "is Pipewise any good" answers.

Do this

1. Route a steady share of your review asks to Capterra and TrustRadius instead of G2 until volumes balance; ask real customers at natural moments (post-onboarding, post-renewal).
2. Respond factually to the two reporting-depth reviews; FIX-12 removes the framing gap they name.
3. Never incentivize beyond platform rules; platforms detect it and engines inherit the result.

Ready to use (review-ask email, under 120 words):

Subject: Two minutes to help teams like yours find us
Hi [name], glad the team is up and running in Pipewise. Buyers researching CRMs increasingly check Capterra and TrustRadius before shortlisting, and our presence there is thinner than on G2. If Pipewise has earned it, a short honest review would genuinely help: [Capterra link] or [TrustRadius link]. It takes about two minutes, and critical notes are as welcome as praise. Thank you either way.

Done when. Capterra passes 40 reviews with a fresh review each month, and TrustRadius shows at least 10 reviews.

Depends on: None

FIX-09 · Listicle gap outreach with the 2026 benchmark data as the give

Off-site and links · Impact: High · Effort: Medium, recurring · Owner: Founder + Marketing

The problem. You are missing from three of the best-CRM articles AI tools quote when buyers ask for recommendations.

Why this matters to you. You are present in most cited lists: the G2 Verazo-alternatives page names you third, and Idenwell's own comparison hub, Cadwyn, and Brightpipe all include you. You are absent from Nordvale's best-CRM-for-startups guide, TechRadar's CRM roundup, and the Ovato small-business list, which names only Verazo, Idenwell, and Dealbird (Q01, Q02, Q04, E1). Rank inside the cited lists is what moves first-position answers.

Do this

1. Pitch inclusion to the three gap articles above, and a position refresh to the two lists where you sit last.
2. Lead every pitch with a concrete give: your 2026 small-team sales benchmark (FIX-10) and a free test account.
3. Log every pitch and response; this list feeds the day-90 re-test directly.

Ready to use (pitch email, under 150 words):

Subject: Data for your CRM roundup

Hi [author], your [article title] is one of the pieces AI assistants actually cite when buyers ask for CRM recommendations, which is how I found it. Pipewise is missing from it, and it may fit your criteria: a real 14-day free trial with no card, published pricing from \$19 per user, 200+ integrations, and SOC 2 Type II. One thing we can offer your readers that vendors rarely share: our 2026 benchmark on how fast small sales teams see payback from a CRM, free to cite with attribution. Happy to send the data and a test account. Either way, thanks for keeping the guide current.

Done when. Outreach is logged for all five targets and at least two placements or documented declines exist.

Depends on: FIX-10 gives the pitch its data asset; start outreach with product access if the data is not ready

FIX-10 · Publish the Small-Team Sales Benchmark as a named annual data asset

Content · Impact: Medium · Effort: Project · Owner: Founder + Marketing

The problem. Your best numbers are buried inside blog posts instead of living in one named report people can cite.

Why this matters to you. Your product data already produces citable numbers, currently scattered across blog posts ("teams that finish setup in week one close more deals"). Numbers buried in posts get cited once; a named, dated, annually refreshed report becomes the reference third parties and engines cite every time the topic comes up, and it is the strongest give for FIX-09.

Do this

1. First slice (Medium effort): publish this year's existing findings as "The Small-Team Sales Benchmark 2026" on its own URL with a one-line methodology, liftable headline statistics, and a visible date.
2. Structure it answer-first: question-formatted headings, real HTML tables, a 60-word opening.
3. Commit to the annual refresh in the page itself; pitch it per FIX-09.

Ready to use (asset concept):

Working title: The Small-Team Sales Benchmark 2026: how fast small B2B teams see payback from a CRM.
Headline statistic candidates: median time to first closed deal after adoption, share of pipeline that goes stale without follow-up automation, average forecast accuracy by team size. Each with date and method line. Opening draft (adjust to verified data): Small B2B sales teams that adopt a CRM in their first month recover the cost within one quarter, according to anonymized data from 3,000+ teams on Pipewise. This benchmark reports payback time, pipeline hygiene, and forecast accuracy by team size, and what changed since 2025.

Done when. The report is live on its own dated URL and pitched to every FIX-09 target.

Depends on: None (first slice uses existing data)

FIX-11 · Wikidata cleanup and the Wikipedia evidence file

Off-site and links · Impact: Medium · Effort: Medium · Owner: Marketing

The problem. Your Wikidata entry is thin, and you have no Wikipedia article and no clean path to one yet.

Why this matters to you. Wikidata (the open database that feeds Google's knowledge panel and helps AI confirm company facts) has a bare entry for you: founding year missing, no CEO statement, and the official-website field points to an old landing page. You have no Wikipedia article, and forcing one before you are notable gets it deleted. Do not force the article; build the evidence file so the facts machines can confirm are correct and consistent.

Do this

1. Correct the Wikidata item: official website = <https://pipewise.com> only; add founding year, industry, and leadership (per FIX-02) with citable references.
2. Keep a running file of independent, in-depth coverage (product reviews, tier-1 press); revisit Wikipedia notability when the file holds three or more substantial independent pieces.
3. Ensure the FIX-07 schema sameAs points to the corrected Wikidata item.

Ready to use (Wikidata statement corrections):

Property	Currently	Correct
official website (P856)	old landing page	https://pipewise.com
inception (P571)	unstated	2019, with a citable reference
CEO (P169)	unstated	Elena Vasquez, with a citable reference

Done when. The item's core claims match the FIX-06 sheet with references, and the notability file exists.

Depends on: FIX-02, FIX-06

FIX-12 · Rewrite key page openings answer-first

Content · Impact: Medium · Effort: Quick win · Owner: Marketing

The problem. Your most important pages open with a slogan, while the plain explanation of what Pipewise is sits three scrolls down.

Why this matters to you. Engines lift heavily from the first portion of a page, and your homepage and product page open with "Close more, chase less" before any statement of what the product is or who it is for. Your comparison pages already lead with a direct answer; the money pages should match, so the AI has a clean sentence to quote.

Do this

1. Place a two-sentence direct answer above the fold on the homepage, the product page, and the pricing page, keeping the slogan after it.
2. Reuse the same canonical sentence in schema (FIX-07) and llms.txt (FIX-05).

Ready to use (homepage opening, before and after):

Before: Close more, chase less. The CRM your team will actually use.

After: Pipewise is a CRM for small and mid-market B2B sales teams that manages pipeline, automates follow-up, and forecasts revenue, with a 14-day free trial and plans from \$19 per user per month. Close more, chase less.

Done when. The first 60 words of each rewritten page stand alone as a quotable answer to "what is Pipewise."

Depends on: FIX-06 for the numbers

FIX-13 · Publish the small-team CRM pillar guide

Content · Impact: High · Effort: Medium · Owner: Marketing

The problem. You have no guide that answers the "how does a tiny team run a CRM" questions your buyers ask first, so AI tools quote a competitor's guide instead.

Why this matters to you. No page on your site owns the informational questions that lead into your category, so engines cite Idenwell's and Nordvale's guides on the setup and ease questions where you are strongest (Q01, Q02, GAP-01). The brand that owns these answers gets named first when the buying questions follow.

Do this

1. Commission the brief below to your writer; target publish inside 3 weeks.
2. Publish at /guides/small-team-crm and add it to the main navigation.
3. Link to it from your pricing page and your Verazo and Idenwell comparison pages with descriptive anchors.

Ready to use (content brief):

Working title: The small-team CRM guide: how a two-person sales team runs pipeline without an admin.

Target questions, used verbatim as H2 headings: "what is the easiest CRM to set up", "can a small team use a CRM without an admin", "how long does it take to set up a CRM" (Q01, Q02, GAP-01).

Opening, drafted (place first, 60 words): A small sales team can run a CRM without a dedicated admin by choosing one that imports contacts, builds a pipeline, and automates follow-up in an afternoon. Pipewise is built for two-to-ten-person teams: guided setup, prebuilt pipeline templates, and no-code automation mean the person who sells is the person who runs it. This guide covers setup time, the features that matter, and what to skip.

Statistic slots: one Pipewise onboarding statistic with a date [CONFIRM: median setup time]; two external statistics with source links from the evidence files.

Table: a setup checklist by day (Day 1 import and pipeline, Day 2 automation, Day 3 reporting), one row per step: what to do, why, time.

Internal links: /pricing, /product, /compare/verazo. **Length:** 1,600 to 2,200 words.

Meta description, drafted: How a two-person sales team sets up and runs a CRM without an admin: setup time, the features that matter, and what to skip, with a day-by-day checklist.

Done when. The page is live, its first 60 words stand alone as a quotable answer to "can a small team run a CRM without an admin", and it appears in AI bot fetch logs.

Depends on: FIX-06 for the numbers

FIX-14 · Publish answer-first FAQ blocks with schema

Content · Impact: Medium · Effort: Quick win · Owner: Marketing

The problem. Your pages answer common buyer questions in paragraphs, not in a question-and-answer format an AI can lift cleanly.

Why this matters to you. Engines pull short, direct answers from FAQ blocks, and yours are buried in prose. A question-formatted FAQ with FAQPage schema (a small block of code that labels each question and answer for machines) gives the engines a clean answer to quote on the branded questions you already win (Q05, Q06).

Do this

1. Add an FAQ section to the pricing and product pages using the drafted pairs below.
2. Deploy the FAQPage schema on each page and validate at validator.schema.org.
3. Keep every answer matched to the FIX-06 canonical numbers.

Ready to use (drafted FAQ pairs plus the FAQPage schema; questions verbatim from the panel):

Q: Does Pipewise offer a free trial?

A: Yes. Every Pipewise plan includes a 14-day free trial with no card required, on Starter, Growth, and Scale.

Q: How much does Pipewise cost?

A: Pipewise is priced per user per month: Starter \$19, Growth \$49, Scale \$89, and custom Enterprise. Annual billing saves two months.

Q: Is Pipewise good for a small sales team?

A: Yes. Pipewise is built for two-to-ten-person B2B sales teams, with guided setup, pipeline templates, and no-code automation, so the person who sells is the person who runs it.

```
{
  "@context": "https://schema.org",
  "@type": "FAQPage",
  "mainEntity": [
    {
      "@type": "Question", "name": "Does Pipewise offer a free trial?",
      "acceptedAnswer": { "@type": "Answer", "text": "Yes. Every Pipewise plan includes a 14-day free trial with no card required." },
    },
    {
      "@type": "Question", "name": "How much does Pipewise cost?",
      "acceptedAnswer": { "@type": "Answer", "text": "Pipewise is priced per user per month: Starter $19, Growth $49, Scale $89, custom Enterprise." },
    },
    {
      "@type": "Question", "name": "Is Pipewise good for a small sales team?",
      "acceptedAnswer": { "@type": "Answer", "text": "Yes. Pipewise is built for two-to-ten-person B2B sales teams, with guided setup and no-code automation." }
    }
  ]
}
```

Done when. The FAQ renders on both pages, the FAQPage schema validates with zero errors, and the answers match the FIX-06 sheet.

Depends on: FIX-06 for the numbers

FIX-15 · Polish batch

Mixed lanes · Impact: Low · Effort: Quick wins · Owner: Mixed

The problem. Small leftovers, none urgent, all quick.

Minor items, batched: confirm the sitemap covers all four comparison pages and the pricing page with truthful lastmod (Developer); run one mobile user-agent fetch of the pricing page to confirm content parity (Developer); attach proof or soften the "the number one CRM for small teams" claim on the homepage (Marketing); set a quarterly Reddit and community listening pass for brand mentions, since none surfaced in this sample's runs (Marketing); age check the two reporting-depth reviews from 2024 that still feed the "thin reporting" hedge, and request a re-review on the current product (Marketing).

Done when. Each item is checked off with a date in the shared tracker.

mentionshare.com

6. Evidence appendix

E1. Where you stand (Claude engine, illustrative)

Share of voice across the panel



Provisional and illustrative. Mention share is how often each brand is named across the buying questions, as a share of all brand mentions on the panel. Pipewise holds third; Verazo and Idenwell lead the discovery questions.

Where you stand, question by question

ID	Question (intent, weight)	Your position	Brands named, in order	Key cited surfaces
Q01	best CRM for small sales teams (discovery, High)	Top group, named third	Verazo, Idenwell, Pipewise, Nordvale, Dealbird	g2.com, capterra.com, pipewise.com (own compare page), techradar.com
Q02	best CRM for B2B startups (discovery, High)	Top group, named for startups	Verazo, Nordvale, Pipewise, Brightpipe, Cadwyn	g2.com, nordvale.com (absent), pipewise.com, ovato.com
Q03	Pipewise vs Verazo, which is better (comparison, High)	Named throughout, positive with hedges	Pipewise, Verazo	g2.com, capterra.com, pipewise.com, trustradius.com
Q04	Verazo alternatives (alternatives, Medium)	Top group, third on G2's list	Idenwell, Nordvale, Pipewise, Brightpipe, Dealbird	g2.com, pipewise.com, capterra.com
Q05	is Pipewise worth it (brand, High)	Sole subject, positive	Pipewise	g2.com, capterra.com, reddit.com, trustradius.com
Q06	how much does Pipewise cost (brand, High)	Sole subject, correct but via the stale page	Pipewise	pipewise.com/pricing-2025/ (stale), g2.com, capterra.com

You hold top-group share of voice across the panel, with Verazo and Idenwell still ahead on the discovery questions. Recomputed when the full multi-engine panel runs.

E2. Question map

The full question by engine map, with each cell showing your position, is the engine ranking snapshot in Section 3. It is not repeated here, so the appendix does not duplicate a body table.

E3. What AI-facing sources get wrong

ID	What circulates	Reality	Source	Severity	Fix
ACC-01	No free trial; starts at \$29	14-day free trial with no card; published pricing from \$19 per user	capterra.com	Important	FIX-03
ACC-02	Solo / Team / Business plans	Retired; current plans are Starter, Growth, Scale, Enterprise	softwareadvice.com	Important	FIX-03
ACC-03	Category listed as Lead Management	Category is CRM	softwaresuggest.com	Minor	FIX-03
ACC-04	Growth price \$39 vs \$49 vs \$45	One true price needed	pricing-2025 page, live page, G2 widget	Important	FIX-01
ACC-05	Founder stated as Elena Vasquez vs Daniel Okafor vs Marta Reyes	Co-founders Elena Vasquez and Daniel Okafor; sources conflict	crunchbase.com vs cbinsights.com vs tracxn.com	Important	FIX-02
ACC-06	Implies Pipewise has no reporting	Site and product state built-in reporting and forecasts	trustradius.com review	Minor	FIX-08
ACC-07	1,200 customers	Site states 3,000+ teams	6sense.com	Minor	FIX-02
ACC-08	3,000+ teams vs over 2,000 companies	Internal inconsistency on own site	pipewise.com home vs compare page	Important	FIX-06
ACC-09	200+ integrations vs 150+	Internal inconsistency on own site	pipewise.com home vs docs	Minor	FIX-06

E4. How AI frames you

Descriptors harvested for Pipewise: easy to set up, good value, responsive support, good fit for small teams, clean interface. Hedges: reporting is not as deep as Verazo (TrustRadius, 2024), fewer native integrations than Idenwell, uncertain enterprise readiness. Competitor framing: Verazo as the larger, enterprise, well-funded option; Idenwell as the mid-market feature leader; Nordvale as the budget pick. Clean-mention share in the panel: high, with hedges concentrated on reporting depth.

E5. Open territory

One candidate gap surfaced: no vendor cleanly owns "CRM that a two-person sales team can run without an admin" as a question-shaped page, and it maps to your easiest-to-set-up strength. Logged as GAP-01, served by FIX-13 (the pillar guide), plus FIX-10 and FIX-12; the full panel will produce the ranked list.

E6. Technical findings

ID	Check (client language)	Status	Severity	Fix
T-01	robots.txt rules for AI bots	Not verified from outside; meta robots permissive; flagged	Pending	FIX-04
T-02	CDN or firewall bot blocking	Fetches to this engine succeeded; other bot strings unverified; flagged	Pending	FIX-04
T-03	llms.txt	Not found in any index; confirm by fetch	Minor	FIX-05
T-04	XML sitemap	Not verified; likely present; confirm coverage of pricing and comparison pages	Pending	FIX-04
T-05	Structured data	No Organization or Product schema found; cross-source facts conflict	Important	FIX-06, FIX-07
T-06	Content readable without JavaScript	Pass: full copy, prices, and tables in served HTML	Clear	none
T-07	Page speed	Optimization layer present; field data not pulled; flagged	Pending	FIX-15
T-08	Mobile parity	Responsive stack; not separately fetched; flagged	Pending	FIX-15
T-09	Stale duplicate pricing pages live	Fail: /pricing-2025/ and /plans/ resolve and get retrieved	Important	FIX-01
T-10	Comparison and alternatives assets	Pass: four matchup pages plus an honest alternatives guide, current	Clear	none

E7. Method

Results are a directional snapshot, not a census: AI answers vary between runs, and cited sources shift month to month even when nothing changes on your side, so treat single-run swings as noise and compare against the run-level detail. Full evidence (engine answers, fetched pages, source URLs) is retained in the engagement log.