



W O R K B O O K

Visibility, Intent & Attract

How You're Discovered & Understood in 2026

Welcome

Growth does not begin where it used to.

A few years ago, the client journey often started with a search, a click, and a visit to your website. Today, prospects are researching quietly, asking AI tools for recommendations, comparing options, checking reviews, scanning your content, and forming opinions before they ever land on your site.

This section of the webinar is about the new starting point of growth: **visibility, intent, and attraction.**

The goal of this workbook is to help you think through how your firm is being found, understood, trusted, and chosen in a world where discovery often happens before the click.

Where **growth** actually begins

Visibility, Intent & Attraction

Section 1:

The Big Shift

ChatGPT drives 89.7% of all AI referral traffic in the Financials industry.



Key Idea:

The biggest shift is not simply that there are more marketing channels or more competition.

The shift is where the journey begins.

Prospects are evaluating you earlier. They are comparing you earlier. They are forming trust or doubt earlier.

In many cases, they may be deciding whether you are worth contacting before you know they exist.

“ ”

You're being evaluated, compared, and understood before you're ever visited.

The old model

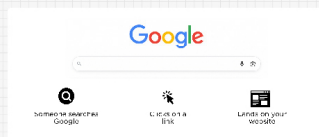
Be found → Get traffic → Convert

The new model

Be understood → Get recommended → Then be found

The biggest shift isn't just more competition or more channels. It's where the journey begins.

It used to look like this:



Today? That's no longer the starting point.

This is a major change. Your firm no longer needs only to appear in search results. It needs to be clear enough, credible enough, and relevant enough to be included in the answers, summaries, recommendations, and comparisons that happen before someone clicks.



Reflection:

Where Does Your Growth Actually Begin Today?

Use the space below to think about where prospects may first encounter your firm.

Where do you believe prospects first learn about you today?

Which sources influence their first impression? Check all that apply.

- | | |
|--|---|
| <input type="checkbox"/> Google search | <input type="checkbox"/> Social media |
| <input type="checkbox"/> AI tools like ChatGPT or Claude | <input type="checkbox"/> Events or webinars |
| <input type="checkbox"/> Referral from a friend or colleague | <input type="checkbox"/> Your website |
| <input type="checkbox"/> Advisor directories | <input type="checkbox"/> Blog content |
| <input type="checkbox"/> Google Reviews | <input type="checkbox"/> Other _____ |
| | _____ |

What do you think they understand about your firm before they contact you?

Section 2:

Visibility Anxiety



Key Idea:

The problem has shifted.

Many firms used to worry mostly about conversion:

- “Why are leads not converting?”
- “Which lead source performs best?”
- “How do we improve close rate?”

Those questions still matter. But in 2026, a bigger question is emerging:

Are we even being considered?

“ ”

The 2026 problem is visibility anxiety.

Visibility anxiety shows up when you are unsure whether your firm is appearing in the places where prospects are researching, whether AI understands your firm, or whether your digital presence is building credibility before the first conversation.

Conversion anxiety
vs.
visibility anxiety

structural traffic loss

The 15%-25% reduction in organic traffic mentioned in and has accelerated, with some reports citing a **61% drop in traditional organic click-through rates as visibility shifts to AI-generated answers.**

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Workbook Exercise:

Your Visibility Anxiety Check

Rate each statement from 1 to 5.

1 = Not Confident

5 = Very Confident

Statement

Score

We show up clearly in Google for the audiences we want to serve.

AI tools can understand who we serve and what we do.

Our website quickly builds credibility and trust.

Our content answers the questions prospects are actually asking.

Our brand clearly communicates why we are different.

A referred prospect would feel confident after researching us online.

Which score concerns you the most? Why?

Section 3:

The Three Layers of Visibility



Key Idea:

Visibility is no longer one thing. It has layers.

1 AI Visibility

Where you show up in answers and recommendations.

2 Search Visibility

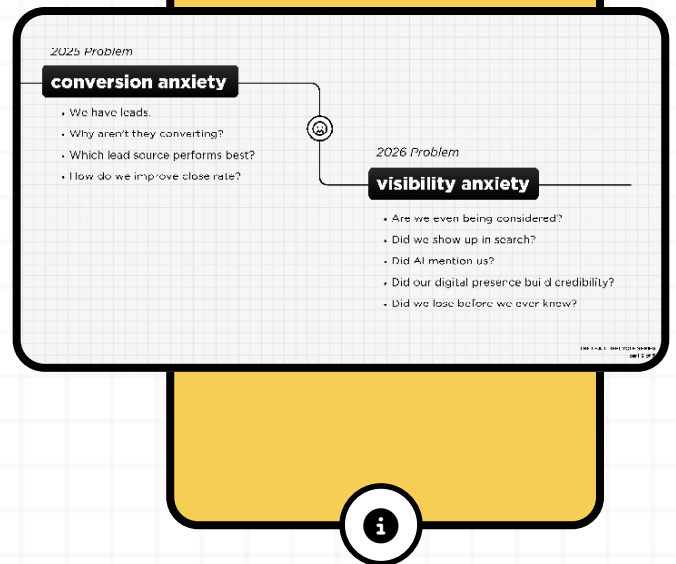
Where you show up in traditional search.

3 Human Visibility

Where you show up through referrals, events, social media, conversations, and relationships.

Most firms are still focused on the lower layers. But the top layer, AI visibility, is now shaping everything underneath it.

Layers of Visibility diagram





Reflection:

How Strong Is Each Layer?

AI Visibility

Can AI tools find, understand, and describe your firm accurately?

Search Visibility

Do you show up for the searches your ideal prospects are likely to make?

Human Visibility




Are referrals, events, social posts, and conversations reinforcing the same message?

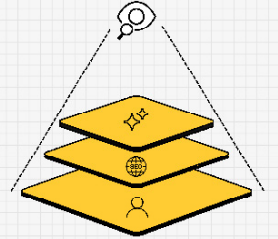
Section 4:

What AEO Means

AEO:
find it,
understand it,
recommend it.

layers of visibility

-  **1. AI Visibility (AEO)**
Where you show up in answers and recommendations
 -  **2. Search Visibility (SEO)**
Traditional search
 -  **3. Human Visibility**
Social, referrals, events
- Most advisors are still focused on the lower layers.
But the **top layer** is now shaping everything we understand.



Key Idea:

AEO stands for **AI Engine Optimization**.

It is about structuring your content so AI can:

- 1 Find it**
- 2 Understand it**
- 3 Recommend it**

You are no longer optimizing only for clicks. You are optimizing to be included in the answer and become part of the conversation.



You're no longer just optimizing for clicks.
You're optimizing to be included in the answer.



Workbook Exercise:

Can AI Understand You?

Answer each question in one or two sentences.

Who do you serve best?

What problems do you help them solve?

What makes your approach different?

What proof or trust signals support that claim?

Where is this clearly stated on your website or in your content?

Section 5:

Content Is No Longer Just Nurture



Key Idea:

Content used to be something firms created after they had someone's attention.

Now, content helps create the attention.

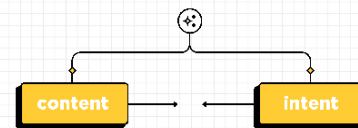
Content does three things:

- 1 Gets you found
- 2 Builds trust
- 3 Signals expertise

This is how prospects decide whether you are worth their time before they ever talk to you.

Content does three things: gets you found, builds trust, signals expertise.

AI + intent



AI doesn't just surface content.
It matches content to intent.
So if your content doesn't align with real questions... you don't show up.

1



Content used to nurture.
Now it gets you discovered.



Reflection:

What Is Your Content Really Doing?

List three pieces of content your firm currently uses.

Content Piece	Gets Found?	Builds Trust?	Signals Expertise?
1 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Which piece of content is doing the most work for your firm today?

Which piece needs to be updated, clarified, or replaced?

Section 6:

AI Matches Content to Intent



Key Idea:

AI does not just surface content. It matches content to intent.

That means your content needs to align with the real questions prospects are asking at different stages of their decision-making process.


If your content does not align with those questions, you may not show up.


AI + intent: content and intent alignment

content matches intent

This is where content becomes strategic

 **Low intent:**
guides education insights

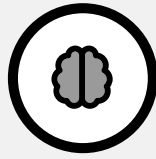
 **Mid intent:**
positioning niche point of view

 **High intent:**
testimonials proof next steps

If you mismatch this... you lose momentum.



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In the Know:

The Three Levels of Audience Intent

Low Intent: Exploration

Prospects are **learning**.

They may be asking:

- “What should I do with my 401(k)?”
- “How much do I need to retire comfortably?”
- “How does financial planning work?”

They need education.

Mid Intent: Consideration

Prospects are **comparing options**.

They may be asking:

- “What is the best advisor for tech executives?”
- “Do I need a fiduciary advisor?”
- “How are advisor fees structured?”

They need differentiation.

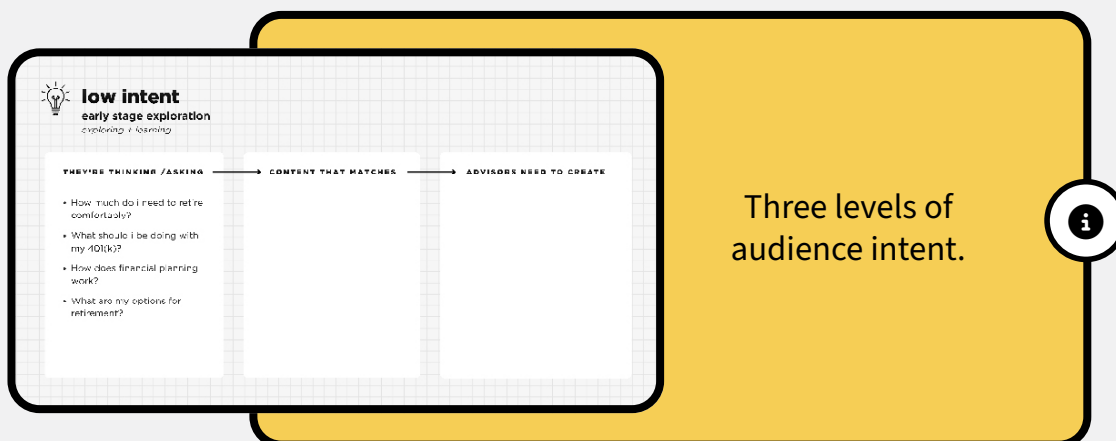
High Intent: Decision

Prospects are **ready to choose**.

They may be asking:

- “Do you work with business owners planning an exit?”
- “Can you help with succession planning?”
- “Do you specialize in equity comp or RSU planning?”

They need confidence.





Workbook Exercise:

Intent Mapping Exercise

Use this section to map your content to the questions your ideal prospects are asking.

Low Intent: Exploration

What are early-stage questions your prospects ask?

1

2

3

What content could answer those questions?

Educational blog post

Beginner guide

Checklist

Calculator or tool

Explainer video

FAQ page

Other:

Content idea to create or improve:



Workbook Exercise:

Intent Mapping Exercise

Use this section to map your content to the questions your ideal prospects are asking.

Mid Intent:

Consideration

What comparison or evaluation questions do your prospects ask?

1

2

3

What content could help them compare and understand your value?

Niche-focused article

Comparison page

Case Study

Webinar or Q&A

Point-of-view article

Service page

Other:

Content idea to create or improve:



Workbook Exercise:

Intent Mapping Exercise

Use this section to map your content to the questions your ideal prospects are asking.

High Intent: Decision

What questions do prospects ask when they are close to choosing?

1

2

3

What content would give them confidence to act?

- Clear service page
- Testimonials or reviews
- Case Study with outcomes
- Credentials page
- Consultation page
- Clear booking CTA
- Other:

Content idea to create or improve:

Section 7:

Relevance Is How AI Decides Who Shows Up



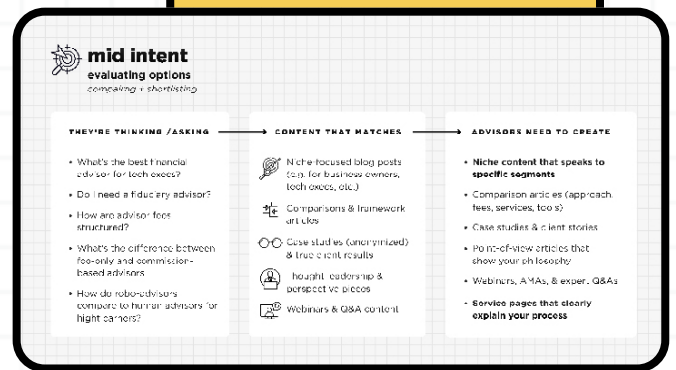
Key Idea:

AI does not reward the firm with the biggest ad budget or the most content.

It rewards relevance.

When someone asks for the best advisor for a specific type of person, AI looks for content that matches that specific intent.

Relevance is how AI decides who shows up.



AI doesn't rank by reach.
It matches by relevance.



Workbook Exercise:

Your Relevance Statement

Complete the sentence:

We are especially relevant for:

Because they are usually dealing with:

And they need help with:

Our content should make that clear by saying:

Section 8:

Your Website Is the Validation Layer



Key Idea:

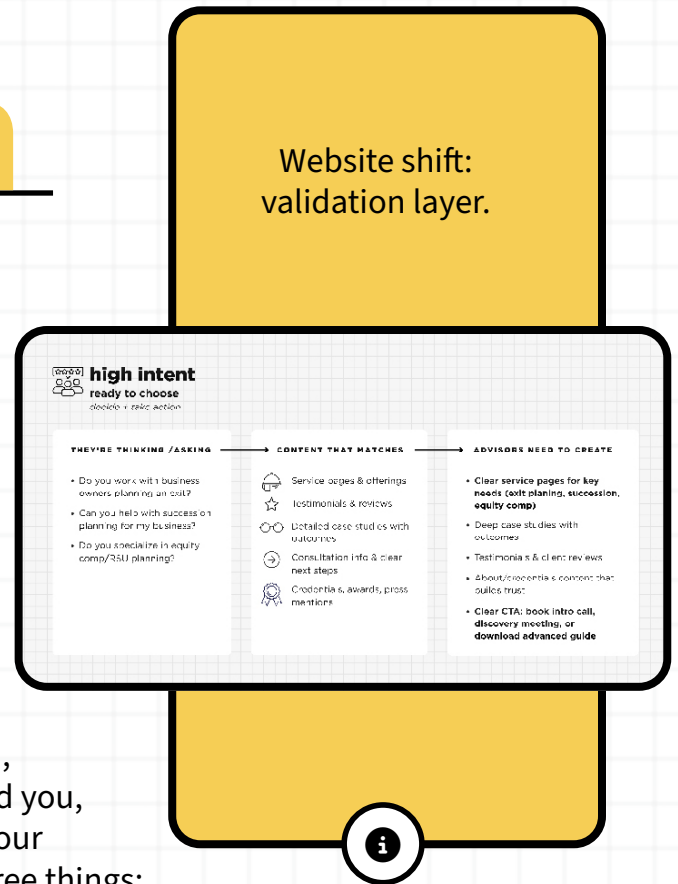
Your website is not always the starting point anymore.

It is the validation layer.

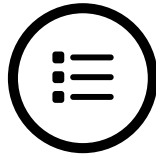
Prospects may already have heard about you, researched you, seen your content, compared you, or asked AI about you. When they arrive on your website, they are often looking to confirm three things:

- 1 Are you credible?
- 2 Can I trust you?
- 3 Are you legitimate?

And AI may be reading your website before they do.



Websites are not the starting point.
They become the validation layer.



Checklist:

Website Validation Checklist

Review your website homepage or main service page.

Question	Yes	No	Needs Work
Is it immediately clear who you serve?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is it clear what problems you solve?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your positioning specific rather than generic?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are your services easy to understand?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include trust signals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a clear next step?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Could AI summarize your firm accurately from this page?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is one improvement your website needs now?

Section 9:

Brand Is an Input to Visibility



Key Idea:

Your brand is not just about how people feel when they see your website.

It is now part of how AI interprets your firm.

Your tone, positioning, clarity, and consistency shape whether humans and AI understand what you do and when to recommend you.

Now, so has AI: brand as an input to visibility.

commodity vs non-commodity content

Generic content gets ignored. Specific, experience-based content builds trust and gets cited by AI search.

COMMODITY	NON-COMMODITY
<p>low intent</p> <p>How much do you need to retire comfortably?</p> <p>Generic content: easy advice and helpful charts. Demerits: no real insight.</p>	<p>Why I Told a 52-Year-Old to Stop Maxing Out His 401(k)</p> <p>A real, unique, relevant perspective. Contributions to a taxable brokerage saved \$40k in the long process of his early retirement. (Private)</p>
<p>mid intent</p> <p>Fee-Only vs. Commission-Based Advisors: What's the Difference?</p> <p>Surveys, definitions, and a comparison of what's best for the final stage of growth investors.</p>	<p>How a 1% Fee Quietly Cost One Tech Executive \$380K Over 12 Years</p> <p>A compelling breakdown showing how fee structure impacted wealth accumulation. (Private)</p>
<p>high intent</p> <p>Schedule Your Free Financial Consultation Today</p> <p>Generic CTA with stock photo and bullet points. Nothing relevant offered.</p>	<p>How We Helped a Stripe Engineer Navigate \$2.1M in Pre-IPO Equity</p> <p>A detailed walkthrough of the tax planning, distribution, rollover, and 409(b) election decisions — with the actual numbers.</p>

↳ The question tells you what to write about. Your real experience to us you **how to make it un-copyable.**



Brand is an input to visibility.



Reflection:

What Does Your Brand Signal?

List three pieces of content your firm currently uses.

Write down three words you hope prospects associate with your firm.

1 _____

2 _____

3 _____

Now write down three words your website and content may actually communicate today.

1 _____

2 _____

3 _____

Where is there a gap?

Section 10:

Lead Generation Is an Acceleration Layer



Key Idea:

Most firms are still tempted to start with the same assumption:

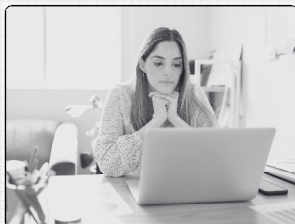
“We need more leads.”

But lead generation is not the starting point anymore.

Lead generation works best when it sits on top of:

- 1 Clear positioning
- 2 Strong content
- 3 Intent alignment

Ads work. Lists work. Events work. But they work better when the foundation underneath them is strong.



Before a prospect engages, they've already made a micro-judgment based on your brand.

Lead generation: an acceleration layer.

the website shift: validation layer

Websites are not the starting point.

They become the validation layer, the 'opt-in' for the next step. Websites are doing more work now, than in the past.

Prospects go there to confirm:

- credibility
- trust
- legitimacy

And AI is reading it before they do.



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Ads, lists, and events work when built on positioning, content, and intent alignment.



Workbook Exercise:

Is Your Foundation Ready for Lead Gen?

Before investing more in lead generation, answer these questions.

Is our positioning clear?

Yes No Somewhat

Notes:

Do we have content for low, mid, and high intent prospects?

Yes No Somewhat

Notes:

Does our website validate trust quickly?

Yes No Somewhat

Notes:

Do we have a clear next step for interested prospects?

Yes No Somewhat

Notes:

ACTION PLAN

Your Visibility, Intent & Attract Action Plan

Use this final section to identify the most important next steps for your firm.

Step 1:

Improve Visibility

What needs to happen so more prospects and AI tools can find and understand you?

Step 2:

Align Content to Intent

Which stage of intent needs the most attention?

- Low intent** — Education
- Mid intent** — Differentiation
- High intent** — Confidence

Why?

ACTION PLAN

Your Visibility, Intent & Attract Action Plan

CONT.

Step 3:

Strengthen Your Website as a Validation Layer

What should your website make clearer?

- Who you serve
- What you do
- Why you are different
- How your process works
- Proof and credibility
- Next step / CTA

Notes:

Step 4:

Align Content to Intent

Choose one content asset to create or improve.

Content asset:

Audience:

Intent Level:

- Low
- Mid
- High

Purpose:

- Get Found
- Build Trust
- Signal Expertise
- Help Convert

Working Title:

Final Takeaway

The modern client journey is quieter, but more intentional.

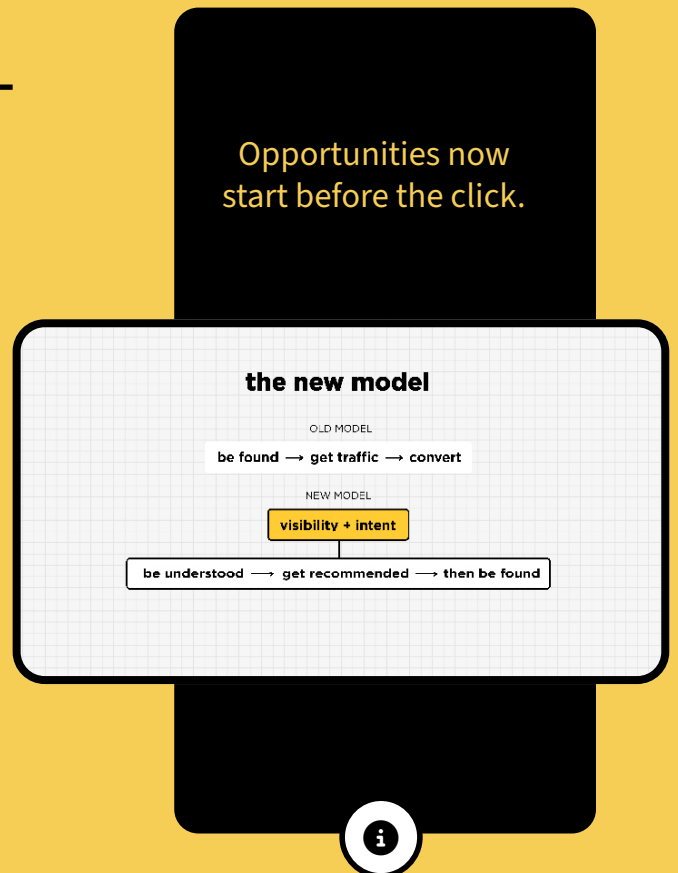
Prospects are researching, comparing, and validating before they engage. AI is helping shape what they see, who they trust, and which firms get recommended.

That means growth starts earlier than it used to.

To attract the right prospects in 2026, your firm needs to be:

- Found
- Understood
- Trusted
- Relevant
- Ready for action

Opportunities now start before the click.



“ ”

The client journey is quieter...
but more intentional.

What To Do Next

Use this workbook with your team to identify where your current growth system may be breaking:

Are you visible?

Are you understood?

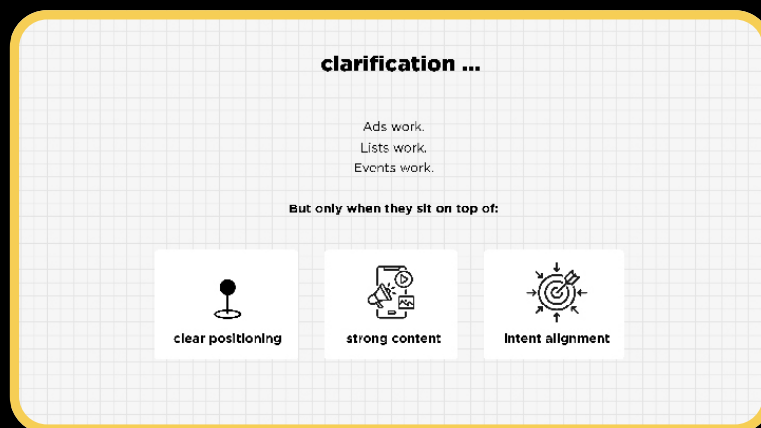
Does your content match intent?

Does your website validate trust?

Is lead generation amplifying a strong foundation?

The firms that win will not simply create more marketing activity.

They will build a connected system that helps prospects discover, understand, trust, and choose them.





Is your website ready for how prospects search and choose today?

Snappy Kraken builds websites with the schema, content foundation, and copy your firm needs to be found, understood, and trusted by prospects — and by the tools shaping how they discover you.

**Book time with us or request a
consultation to learn more.**