

The technology company *playbook*

How to become the software ChatGPT names when buyers ask for a shortlist



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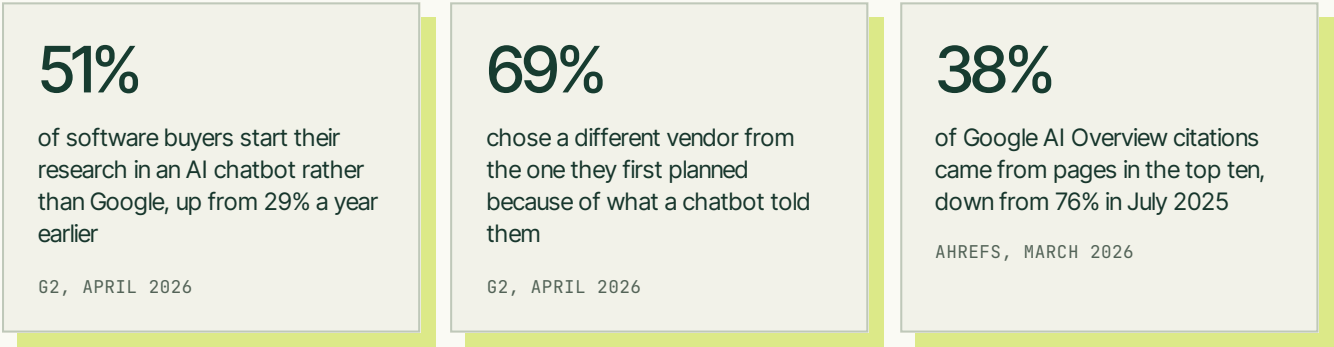
Co-founder and CEO, Fortitude Media

AI assistants recommend software they can match to a buyer's situation and then check somewhere else. Say plainly who your product is for, put documentation, integrations, security and pricing on public pages, and publish fair 'alternatives to' pages. Then get reviewed on the sites your buyers read.

For founders and commercial leaders at UK B2B software and SaaS companies with £1m to £20m+ in revenue.

Software buyers now ask an AI assistant before they ask a salesperson. In G2's April 2026 survey of 1,076 software buyers, 51% said they start their research in an AI chatbot rather than Google, up from 29% a year earlier. G2 runs a review site, so treat the figures as directional. The person asking is often not technical. They describe their industry, their size and the systems they already use.

The cost is a shortlist you never see. In the same survey, 69% had chosen a different vendor from the one they first planned because of what a chatbot told them. For example, an operations director replacing a repairs scheduling system asks ChatGPT for the best options for UK housing associations. She gets five names and a comparison table. Your product was built for housing associations. It is not in the table.



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The questions that decide *who gets the call.*

Buyers ask for shortlists, alternatives and reassurance in the language of their own industry, usually naming a size, a system or a place.

BUYER ASKS

What is the best practice management software for a 30-person accountancy firm in the UK?

BUYER ASKS

What are the best repairs scheduling systems for UK housing associations, and how do they compare?

BUYER ASKS

What are the alternatives to our current field service scheduling system?

BUYER ASKS

Does this CRM integrate with Xero and Microsoft 365?

BUYER ASKS

Is this software ISO 27001 certified, and is our data stored in the UK?

BUYER ASKS

How much does field service software cost per user for a team of 40 engineers?

BUYER ASKS

Which document management systems are on G-Cloud and hold Cyber Essentials Plus?

TRY THIS

Ask five of these in ChatGPT, Gemini, Claude, Copilot and Perplexity, each in a fresh chat. Note who is named, and who is named instead of you. Answers vary from run to run, so only count a result that repeats.

How the assistants choose

01 A clear use case and customer

'Repairs scheduling software for UK housing associations' matches a buyer's question. 'An intelligent operations platform for modern teams' could describe hundreds of products.

02 Product detail it can read

Documentation, integrations, security and pricing on public pages, in plain text. Anything behind a login, a form or a script does not exist for the assistant.

03 Independent opinion

Reviews on G2 and similar sites, marketplace listings, trade press and forum threads carry more weight than anything you say about yourself.

04 The same story everywhere

Your website, LinkedIn, review sites, marketplaces and Companies House should describe the company in the same words.

05 Answers to the next question

Ranking on Google helps but does not guarantee a mention, because Google now runs several related searches for one question. Pages on integrations, security, migration and price get pulled in.

The sources assistants *trust in your field.*

An assistant rarely names a firm on its own website's word. It looks for the same facts in places that have checked you independently. These are the ones that matter most for technology companies.

SOURCE	WHY IT COUNTS	WHAT TO DO
G2	It is the review site named most often in the citation studies that can be verified, including 1.1% of all ChatGPT citations in Profound's 2025 study.	Complete your profile and ask recent customers for reviews that mention their industry, company size and what the product solved.
Gartner Peer Insights	gartner.com as a whole made up 7.0% of Perplexity's top ten sources in Profound's study.	Claim your listing and keep the description and pricing model the same as your website.
Capterra, GetApp and Software Advice	They were not named in the verifiable citation studies, but smaller firms use them to compare tools.	Complete these profiles if your buyers are smaller firms, and check whether Perplexity cites them in your category.
Microsoft AppSource, AWS Marketplace, Salesforce AppExchange and the Xero App Store	Each listing confirms what you integrate with, from a source you do not control.	List every integration you support and keep the figures the same as your pricing page.
G-Cloud 15 on the Digital Platform	G-Cloud 15 went live on 6 August 2026, and public sector buyers shortlist on its Digital Platform.	Name the framework and lot on your site, for example 'G-Cloud 15, Lot 2b: Other Software as a Service'.
Cyber Essentials, ISO 27001 and CREST	Cyber Essentials and Cyber Essentials Plus are the NCSC's schemes, and current certificates can be looked up on the IASME website.	Show each certification on a public security page, with where data is hosted and your sub-processors.
Reddit, GitHub, forums and trade press	Assistants answer 'alternatives to' questions from forums and review sites as much as from vendor websites.	Have your engineers answer questions in the right threads, and offer comment to Computer Weekly, Computing, UKTN and the trade press of the industries you sell into.

Ten questions. *Be honest.*

- | | | | |
|----|---|------------------------------|-----------------------------|
| 01 | Does your homepage say in plain words which industry and size of customer your product is for? | ☐ Yes | ☐ No |
| 02 | Do you have a separate page for each core customer type, written in the words that customer uses? | ☐ Yes | ☐ No |
| 03 | Can your key pages show their text without scripts running, and do your robots.txt and hosting settings let AI crawlers in? | ☐ Yes | ☐ No |
| 04 | Is most of your documentation public, including one page per integration that says what it does? | ☐ Yes | ☐ No |
| 05 | Does a public security page list your certifications, where data is hosted, your sub-processors and how you handle UK GDPR? | ☐ Yes | ☐ No |
| 06 | Is your pricing model, with a starting point, published as dated text that matches your marketplace and review listings? | ☐ Yes | ☐ No |
| 07 | Is every case study published as an open web page rather than a gated PDF? | ☐ Yes | ☐ No |
| 08 | Have you published a fair, dated 'alternatives to' page for the competitor you meet most often? | ☐ Yes | ☐ No |
| 09 | Do you have recent, detailed reviews on G2 or wherever your buyers research? | ☐ Yes | ☐ No |
| 10 | Do your website, LinkedIn, review sites, marketplaces and Companies House describe the company in the same words, with any former name linked to the new one? | ☐ Yes | ☐ No |

Fewer than seven yeses means buyers asking an assistant for a shortlist in your category are probably being given other names.

Common mistakes

Describing the product in the abstract

A homepage about 'the intelligent platform for modern teams' matches nobody's question. Buyers name an industry, a size and a problem, so your pages need to as well.

Hiding what buyers check

Documentation behind a login, whitepapers behind a form and text that only appears once scripts run are all invisible to ChatGPT, Claude and Perplexity.

Saying 'contact us' for pricing

It does not stop an assistant answering a cost question. It only means the answer comes from a review site, a reseller or an old forum thread.

A comparison you win on every row

It reads as an advert and is less likely to be quoted. Unsupported claims about a competitor also damage your credibility and can create legal risk.

What to do this month, *and next*.

This month

- 01 Check the assistants can read you: your robots.txt, your hosting settings and whether key pages show their text without scripts running.
- 02 Write one 'who it is for' page for each core customer type, using the words those customers use about their own problem.
- 03 Publish your pricing model, a security page and an integrations page in plain text, and date the pricing page.
- 04 Write one fair 'alternatives to' page for the competitor you meet most, including when that competitor is the better choice.
- 05 Ask ten recent customers for reviews on G2 or wherever your buyers research, straight after a go-live or renewal.
- 06 Set up a list of buyer questions and run it in clean sessions several times a month.

The next ninety days

- 01 Add an 'alternatives to' page for each competitor you meet often, with a two-sentence answer at the top, a table that includes at least one option that is not you, what switching involves, and how and when the facts were checked under a named author.
- 02 Run three category prompts in Perplexity, open the sources under each answer and note which review sites appear. Complete those profiles first and repeat the check monthly.
- 03 Turn gated case studies into open web pages, and publish the main findings of each whitepaper in plain text.
- 04 Match your listings on marketplaces, review sites, LinkedIn, partner directories and Companies House to your website, and name any public sector framework and lot you hold.
- 05 Redirect old pages one by one if you have rebranded or bought a company, declare the relationship in structured data on both domains and publish a plain page explaining what changed.

How to tell it is working

- Track 20 to 50 buyer questions, covering category shortlists, 'alternatives to' your main competitors, security, integrations and price, in ChatGPT, Gemini, Claude, Copilot and Perplexity.
- Add a free-text 'how did you hear about us' field to your demo form and read it weekly.
- Record whether you are named, who is named instead and whether the details are right, and count a win only when it repeats.
- Expect changes within weeks in assistants that search the web live, and months for answers drawn from a model's own memory.

Straight answers.

Is gating our whitepapers and case studies hurting our visibility in AI search?

Yes, for anything behind the form. An assistant cannot fill in a form, so a gated PDF does not exist for it. Publish case studies as open web pages. For a whitepaper, publish a page with the main findings in plain text, and keep the form for the full download if you must.

Should we make our documentation public?

Most of it. Feature guides, setup articles and integration notes help buyers and give assistants accurate material about what the product actually does. Keep anything security-sensitive or customer-specific behind a login. Competitors can usually sign up for a trial anyway, so hiding the rest protects very little.

How many reviews do we need on G2 or Capterra?

There is no magic number. Recency and detail matter more than volume. Reviews that mention the reviewer's industry, company size and what the product solved give an assistant something to match to a buyer's question. The best time to ask is straight after a successful go-live or renewal.

Do analyst reports still matter if buyers use ChatGPT?

Less than reviews for most firms of your size. TrustRadius's July 2026 survey of 1,862 tech buyers found 74% use reviews and only 13% consulted analyst reports. Of those buyers, 63% had used AI in their purchase, and 94% of them fact-checked it at least sometimes. Put reviews, marketplace listings and customer stories first.



ID-Pal is a B2B technology company, so its problem is one many software firms will recognise.

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UK buyer questions where AI now names ID-Pal

PROBLEM	Traffic to the pages that bring in enquiries fell by around 40 per cent after the NorthRow move, and AI never put ID-Pal on a UK shortlist.
WHAT WE DID	A Paid Discovery found the cause in a week. The fix was live in week one, then we rebuilt the pages buyers ask about.
RESULT	Named on four UK buyer questions by September 2026, up from none in May.

“They work like founders: they get on with it, and they tell you the truth.”

Dan Brooksbank, Marketing Director, ID-Pal

[READ THE CASE STUDY](#)



The screenshot shows the ID-Pal website with a dark blue header containing the logo and navigation links for Solutions, Platform, and Integrations. The main content area has a breadcrumb trail 'ID-Pal > Industries > Wealth Management' and a large heading 'AML and KYC wealth mana'. Below this, a subheading reads 'Automate KYC, KYB and AML c clients faster, reduce complianc trusts, holding companies and f behind every relationship.' A list of features follows, each with a blue circular icon: 'KYC, KYB and AML compliance i', 'PEP, sanctions and adverse mec onboarding', and '250+ jurisdictions and 16,000+ I'. At the bottom is a blue button with the text 'Get a demo' and a right-pointing arrow.

The full guides, *free and dated*.

How does a B2B tech company get recommended when buyers ask ChatGPT?



How do AI crawlers read my website, and are we letting them in?



What happens when buyers let an AI agent build the shortlist?



Do we need schema markup for AI assistants to understand our site?



Why does ChatGPT describe my firm wrongly, and how do I fix it?



How do we find out whether ChatGPT is recommending our firm?



SOURCES

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