

# **LLM VISIBILITY SOLUTIONS FOR FINANCIAL INSTITUTIONS**

**Technology Assessment - Final Presentation**

**Team 14**

Under the guidance of Evan Czopek - Director of  
Business Cards & Payments at Capital One



DARTMOUTH



# Meet the team



Aditi Parvati

- BE in Electronics and Communication
- +1 years of experience in Product Management



Austin Pflum

- BS in Mechanical Engineering
- Sculpture & Construction management



Viraj Yadav

- BE in Computer Engineering
- 1 year of experience in Software Product Development and Finance Consulting



Thomas Hamilton

- BS in Material Science
- 3 years of experience in defense

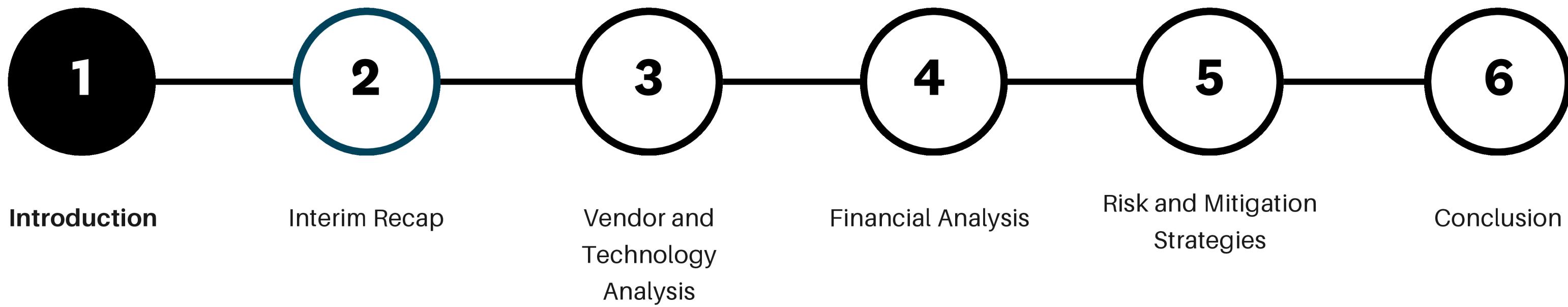


Darsheel Sanghavi

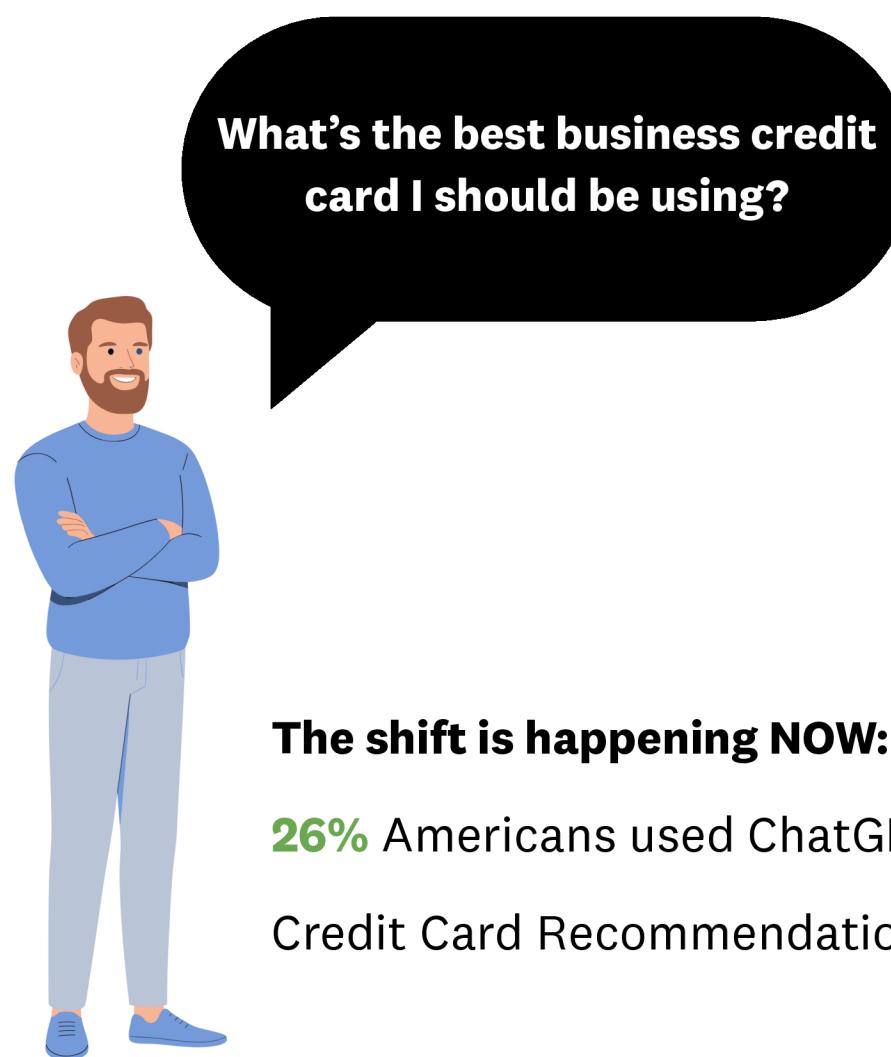
- BE in Computer Engineering
- AI SaaS Product experience



# Agenda



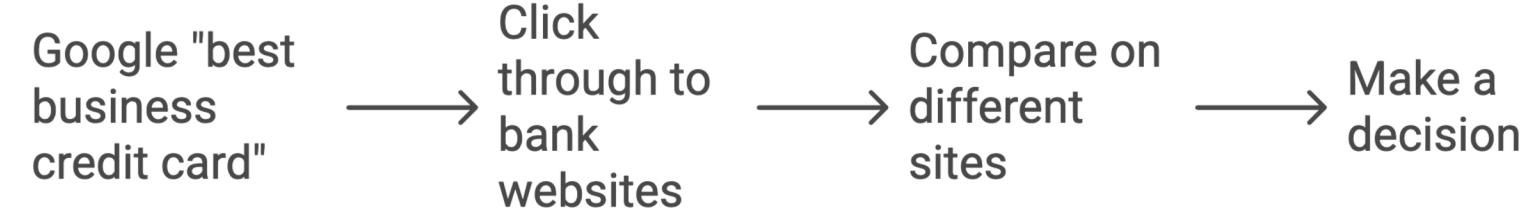
# Small business owners are shifting to AI-powered search, creating a visibility crisis for Financial Institutions



**The shift is happening NOW:**

**26%** Americans used ChatGPT for Credit Card Recommendations

## Traditional Search



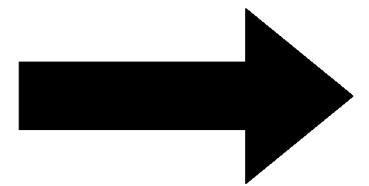
## AI Search



# **Financial institutions must invest in visibility tools to boost their visibility on LLMs**

**75%**

Decline in Traditional  
Search by 2030



## **KEY QUESTION**

What technologies can financial institutions invest in to improve and monitor their visibility on LLM platforms for small business credit cards?



**Our Recommendation | Profound provides a variety of tools and metrics to track and improve visibility on LLMs**



# Profound



# Profound continuously tracks real-time citation activity across repeated queries

A screenshot of a search interface demonstrating real-time citation tracking. At the top, a large text box contains the query: "companies offering the best business credit card in the US for small business owners". Below this, a "Sources" button is highlighted with a hand-drawn arrow pointing from the main title. A smaller arrow points from the "Sources" button to a "Citations" section on the left, and another arrow points from the "Citations" section to a "More" section on the right.

**Citations**

- NerdWallet  
Best Business Credit Cards of September 2025 - NerdWallet  
After evaluating close to 70 options, our best business credit cards include Ink Business Unlimited, Venture ...
- NerdWallet  
Best Business Credit Cards of November 2025 - NerdWallet  
After evaluating close to 70 options, our best business credit cards include Ink Business Unlimited, Venture ...
- Expensify - Expense Management  
The best high-limit business credit cards of 2025 - Expensify  
September 17, 2025 — Explore the best high-limit business credit cards of 2025. Compare top cards,...
- MyFICO Forums  
Which Cards In 2025? - myFICO® Forums - 6810729  
February 14, 2025 — The only Capital One business cards that don't report to personal are the Spark Ca...
- The Motley Fool  
Top Business Credit Card Offers Worth Checking Out This Week  
November 3, 2025 — Elevated Welcome Offer: Earn 200,000 Membership Rewards® points after you...

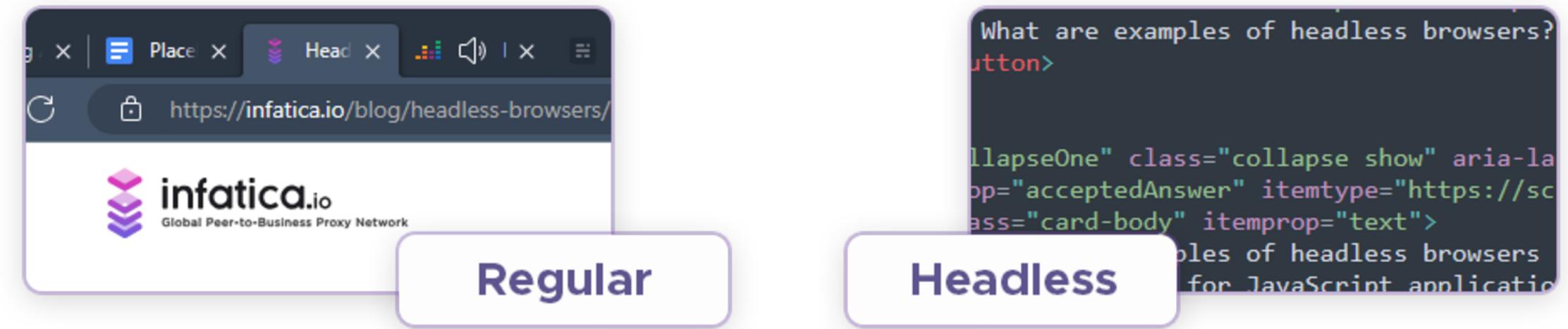
**More**

- wallethub.com  
Best Business Credit Card Signup Bonus Offers (2025) - WalletHub  
August 19, 2025 — The best business credit card signup bonus is 90,000 points for spending \$8,000 i...
- swipesum.com  
Best Business Credit Cards for Smart Spending in 2025 - SwipeSum  
July 30, 2025 — Top business credit cards for 2025 include Brex for startups, Ramp for expense...
- reddit.com  
What are the top small business credit cards people recommend ...  
July 17, 2025 — Chase Ink or Amex Blue are okay for consistency. I also use Lili's expense tracking since i...
- youtube.com  
Best Business Credit Cards for 2025 (Complete Guide) - YouTube  
December 31, 2024 — Maximize Your Business Rewards: Complete Card Strategy | Want us to scale...
- creditkarma.com  
Best Business Credit Cards for November 2025  
Ink Business Cash® Credit Card: Best for staying on budget; The Blue Business® Plus Credit Card from...
- brex.com  
The 5 Easiest Business Credit Cards to Get of November 2025 | Brex  
The Brex business credit card is the easiest card to get approved for thanks to a lack of a personal...
- techrepublic.com  
... techrepublic.com

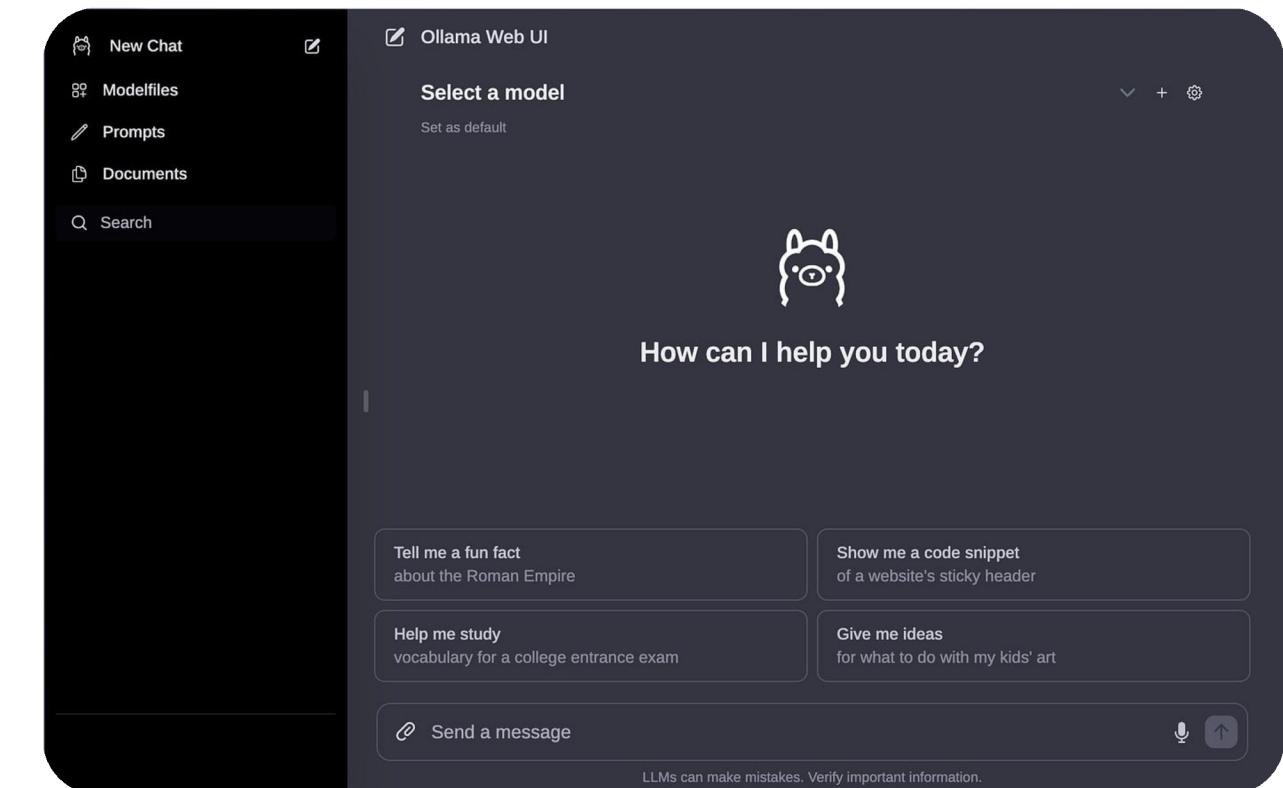


# Profound metrics are more reliable because they are run on more devices

- Runs on **real** front-ends of **millions of devices daily**, not just API calls
- Sends millions of prompts through actual user interfaces
- Resource-intensive and expensive but enables authentic interaction data
- Real-world integration differentiates from API-based competitors



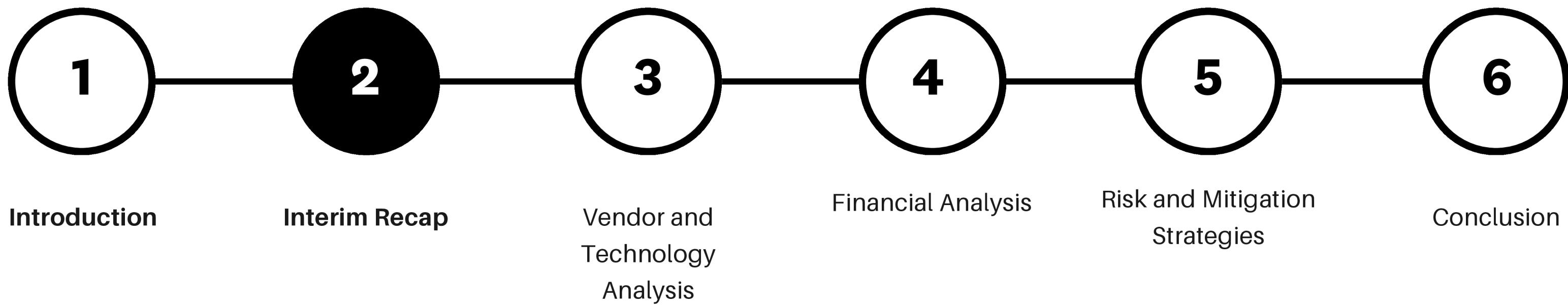
- Leader in AI-driven marketing control and optimization
- **Authentic data** collection from **genuine user interactions**
- Competitive edge over solutions relying solely on API signals
- Superior optimization capabilities through real-world insights



```
response = client.chat.completions.create(  
    model="gpt-4",  
    messages=[  
        {"role": "system", "content": "You are a helpful  
assistant."},  
        {"role": "user", "content": "What is the capital of  
France?"}  
    ]  
)  
print(response.choices[0].message.content)
```



# Agenda

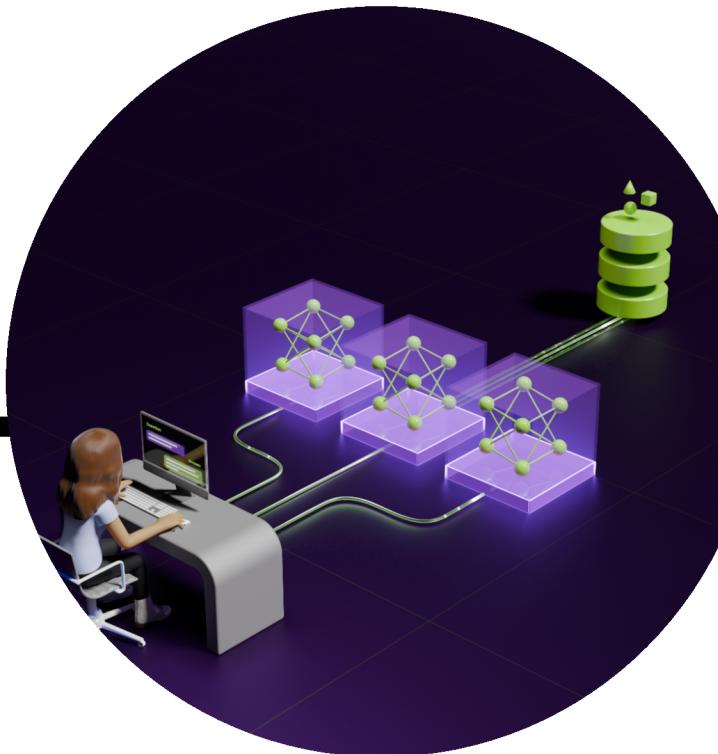


# Three key technological categories help shape how LLMs interpret and represent your brand



## DATA AGGREGATORS

Structure and syndicate business data across search engines, maps, and AI systems



## RAG INFRASTRUCTURE

Vector databases that enable real-time retrieval of accurate information

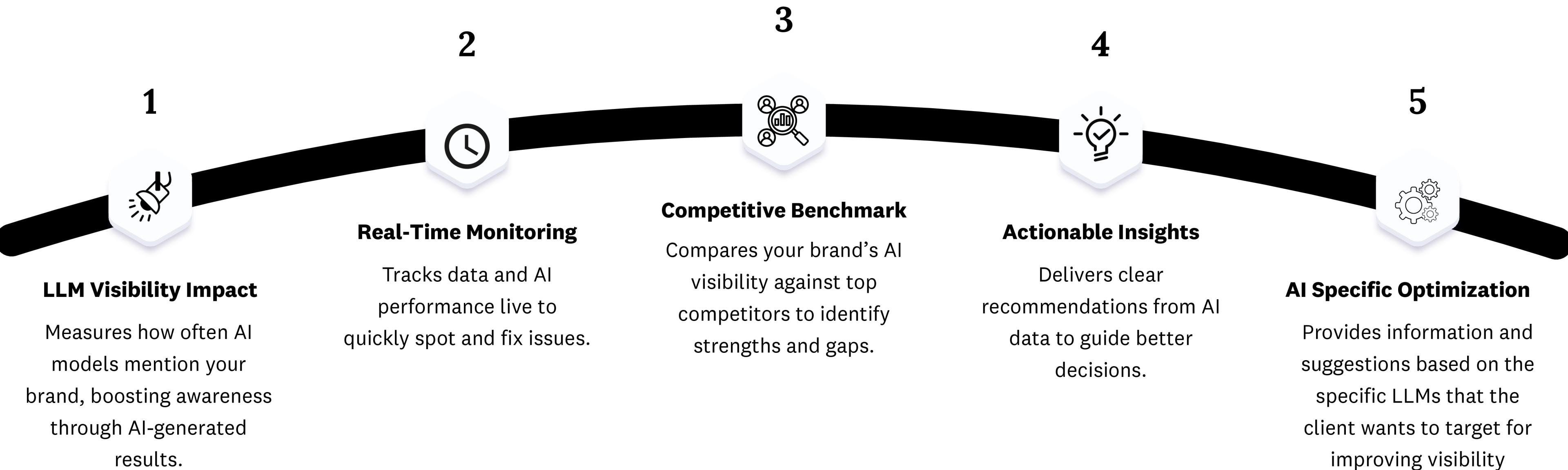


## LLM VISIBILITY AND TRACKING

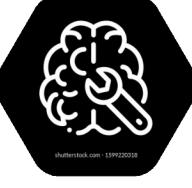
LLM marketing platforms that unify analytics and content optimization



# Interim Recap: Our evaluation focuses on five key factors that most influence AI visibility

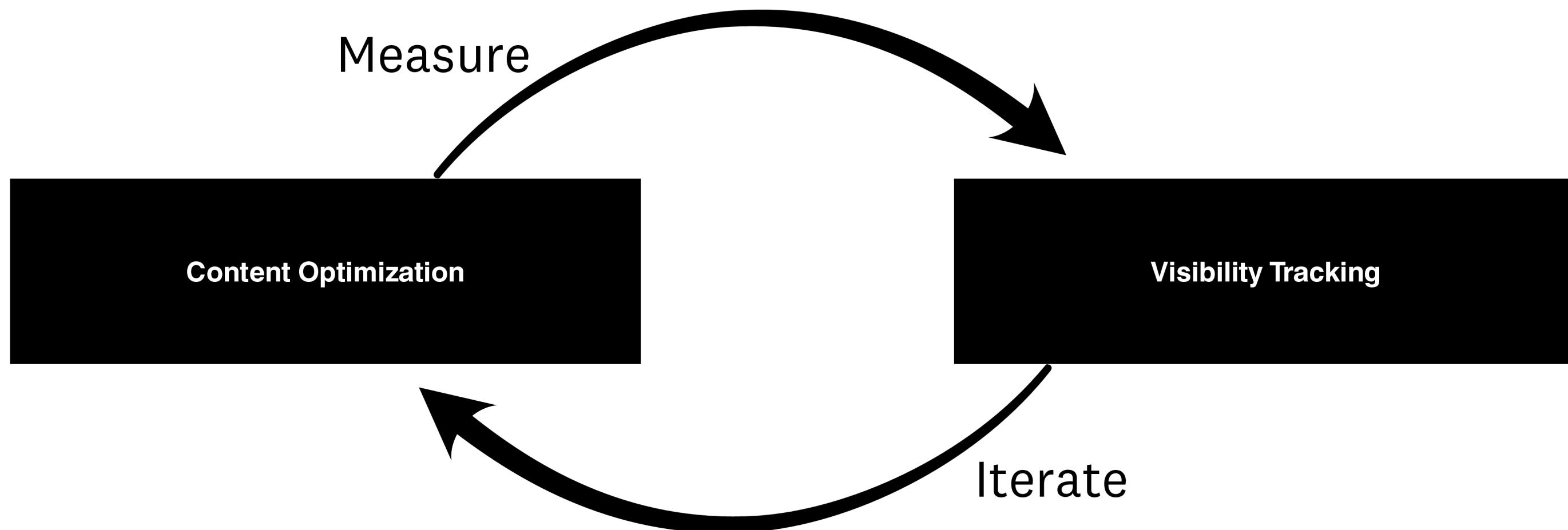


# LLM Visibility & tracking category shows the most promise

Criteria	Data Aggregators	RAG Infrastructure	LLM Visibility and Tracking
 LLM Visibility Impact	4	3	5
 Real-Time Monitoring	0	0	5
 Actionable Insights	3	0	4
 AI Specific Optimization	4	4	5
 Competitive Benchmark	0	0	5
<b>TOTAL SCORE</b>	2.2	1.4	<b>4.8</b>



# **Content optimization drives LLM Visibility, but you cannot optimize what you cannot measure**



# Vendors deliver 20X faster with proven banking ROI when compared to in-house alternative

## Build In-House

- 24–36 months to launch
- \$10M–\$50M+ development cost
- High technical & compliance risk
- Divert team from core business
- Reinventing the wheel

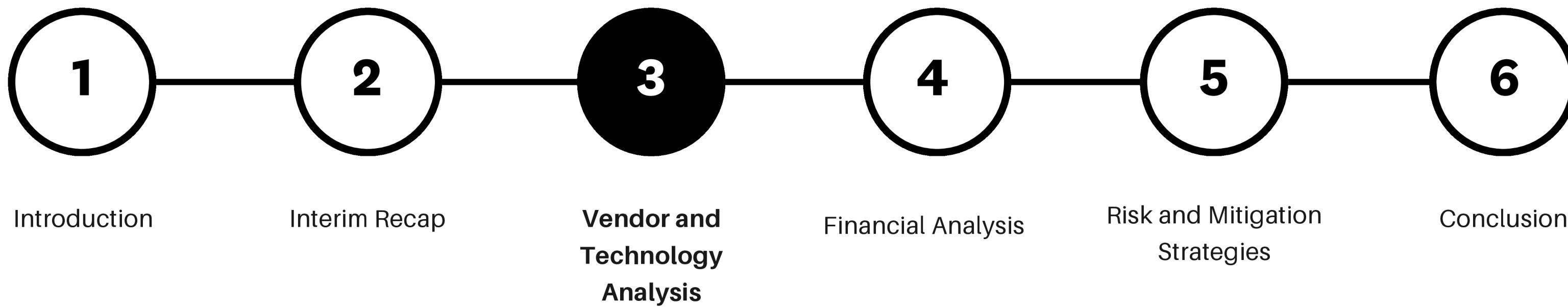


## With a Vendor

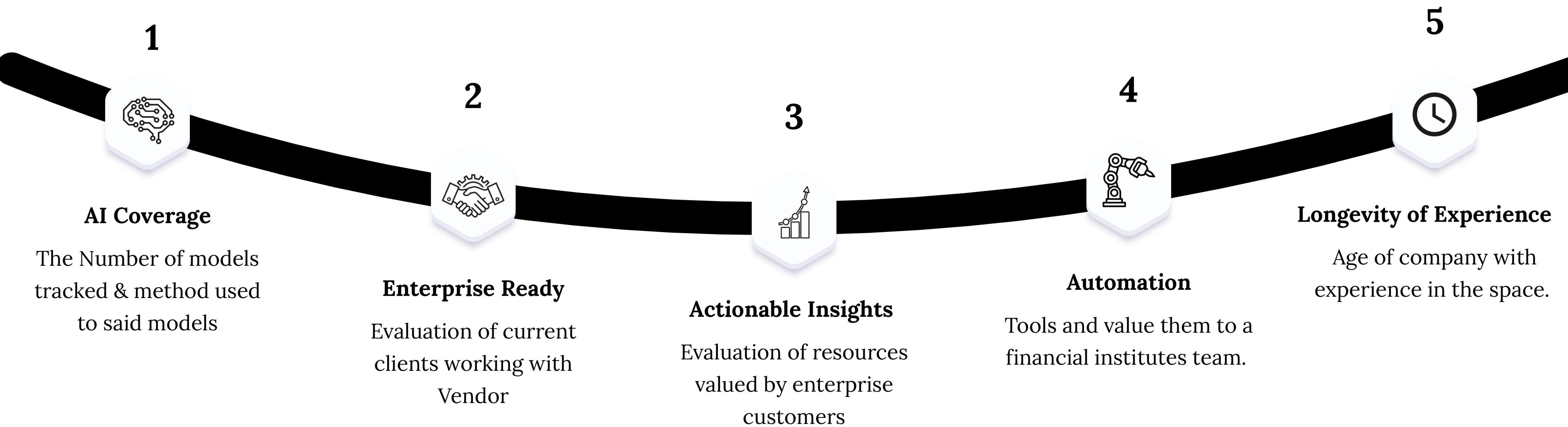
- 1–3 months to launch
- Proven ROI in 6–12 months
- Battle-tested, compliant day-1
- Focus 100% on your customers
- Leverage years of specialization



# Agenda



# Five enterprise-grade criteria drove Vendor Selection



# Profound is a clear choice for enterprise Financial Institutions

Criteria	Profound	WriteSonic	Semrush
 AI Coverage	5	3	1
 Enterprise Ready	3	0	5
 Actionable Insights	5	1	4
 Automation	5	5	3
 Longevity of Experience	1	2	5
Total Score:	3.8	2.2	3.6



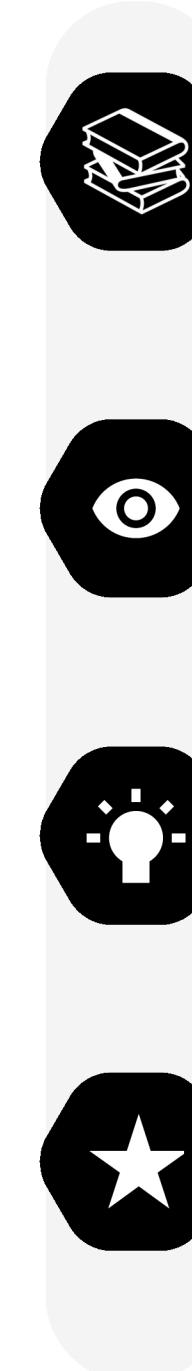
# Profound delivers four in depth analysis that turn AI from black box to measurable metrics

## Financial Institutes

- Provides keywords, Profound generates relevant prompts
- Prompts run on headless devices, most accurate method



12k-112k Prompts Run Daily



### CITATION SCORE

Measures **how often your company appears** when AI platforms answer relevant queries in your industry

**Ideal benchmark:** ~10% citation rate

### VISIBILITY SCORE

Tracks the **percentage of AI answers that cite your brand**

**Good Benchmark:** ~70% visibility rate

### COMPETITOR SCORE

Tracks visibility & citation metrics for all companies space. **Shows & compares equivalent metrics for all companies** in space

### AGENT ANALYTICS

**Monitors how AI systems access and interpret content** on websites, providing visibility into what information AI systems extract



# Profound visibility interface | Breaks down every citation location, visibility, while comparing to competitors

Personas | specific, customizable audience types

Breakdown where each citation comes from

Visibility Break down of competitors

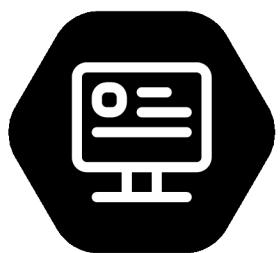
The screenshot shows a dashboard for American Express. On the left, a sidebar lists various analytics and support options. The main header says "American Express". Below it, tabs include "Visibility", "Prompts", "Platforms", "Regions", "Personas" (highlighted with a black oval), "Shopping" (Beta), "Sentiment", and "Citations" (highlighted with a black oval). A button "Export 17.2k answers" is also present. The "Visibility Score" section displays a graph titled "Visibility Score" with a value of 57.5% and a -0.2% change. The graph tracks visibility over time from Oct 22 to Oct 28. The "Visibility Score Rank" section shows American Express at #1 with a visibility score of 57.5%. A callout highlights the "Visibility Break down of competitors" section, which lists the following data:

Asset	Visibility Score
1. American Express Owned	57.5% -0.2%
2. Ramp Owned	52.8% +1.9%
3. Brex Owned	47% +1.6%
4. Chase Owned	35% +1.6%
5. Capital One Owned	33.9% +2.8%

Checkmarks indicate "Current Period" and "Compare competitors". A "Expand" button is located at the bottom right of the competitor list.

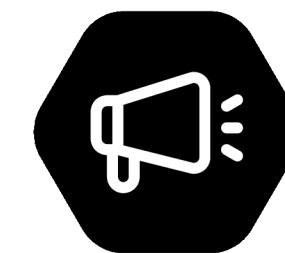


# End-to-End content optimization: Create, analyze, and optimize AI-ready content before and after publication



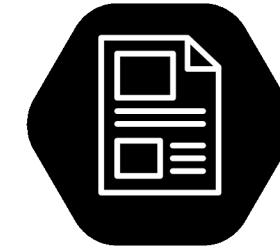
## AI Optimized Content Briefs

- Guidance on topics, headings, keywords
- Creates **strategic briefs for marketing teams**
- Generates content that meets user-defined criteria.



## Content Optimization for All Stages

- Ideation → Draft → Before Publication → After Publication

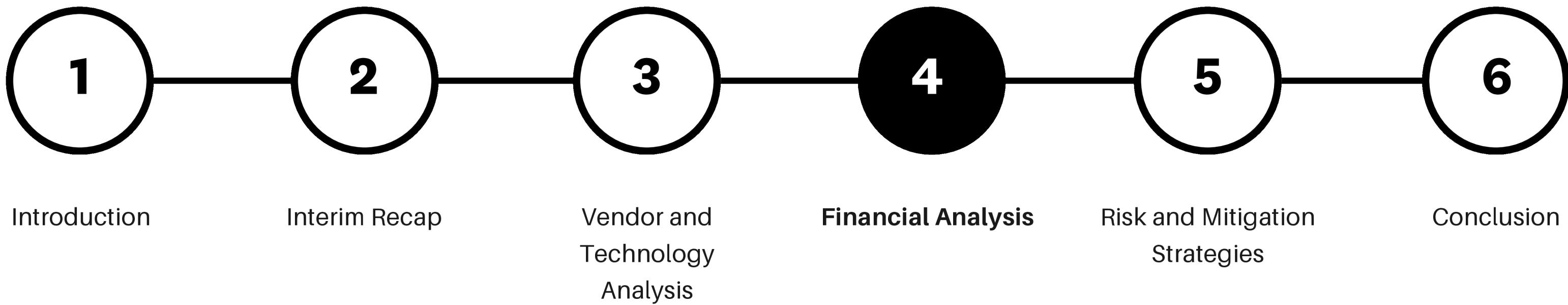


## AEO Content Templates

- Built on **analysis of millions** of the most-cited pages
- Templates replicate exact structural patterns that consistently earn AI citations



# AGENDA



# Profound | Three tier pricing Package, Platinum Package Ideal for Large Enterprises

Criteria	Silver	Gold	Platinum
\$ Annual Price	\$250,000	\$500,000	<b>\$800,000</b>
# No. of Supported Platforms	4	5	<b>All</b>
📅 Daily Prompt Executions	12,000	36,000	<b>112,000</b>
📅 Monthly Prompt Executions	360,000	1,080,000	<b>3,360,000</b>

Supported Platform List : ChatGPT, Perplexity, Google AI. Google AI Overviews, Google Gemini, Microsoft Copilot, Grok, Meta AI

All packages offered by Profound include **post-sales service in the form of a Support Manager, an AI Strategist** and several other resources



# Profound | \$700k to \$1.7M/Year ROI with quoted 5% increase in visibility



Current AI Visibility

Annual AI Mentions: **578,400**  
Bounce Rate: **33.94%**  
Industry CTR/CVR: **5.7%**

578.4k Mentions



Customer Base

Small Business CC: **4% of all 106Mn CC in circulation**  
Annual Revenue Per User: **\$1300 to \$2300**

4M+ CC Users



Investment

Profound Platform Cost: **\$800,000**  
Annual Resources Cost: **\$146,000**

\$946k/year

Annual Visibility x (1-Bounce Rate) x Visibility Increase x Click Through Rate x Per user annual rev - Cost of Vendor + Interest amount on overdue each month - Losses incurred due to charge-off = Expected Net Income

$$578,400 \times (1-0.3394) \times 0.05 \times 0.057 \times \$1300 \text{ to } \$2300 - 946,000 + 160,000 - 8322$$

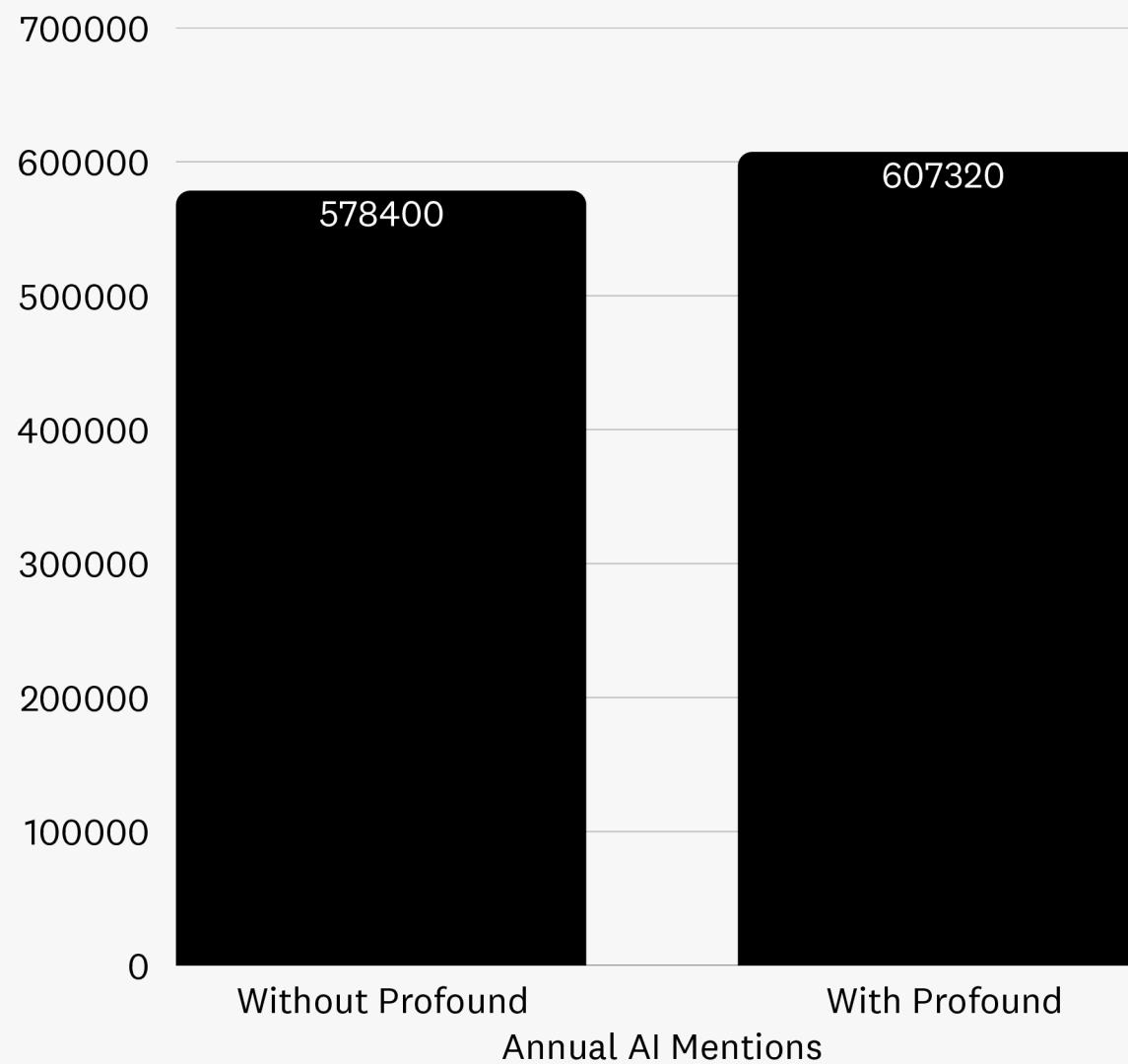
**Expected Net Income: \$700k to  
\$1.7M/year**



# \$946k/yr invested into Profound produces a 74~183 percent ROI

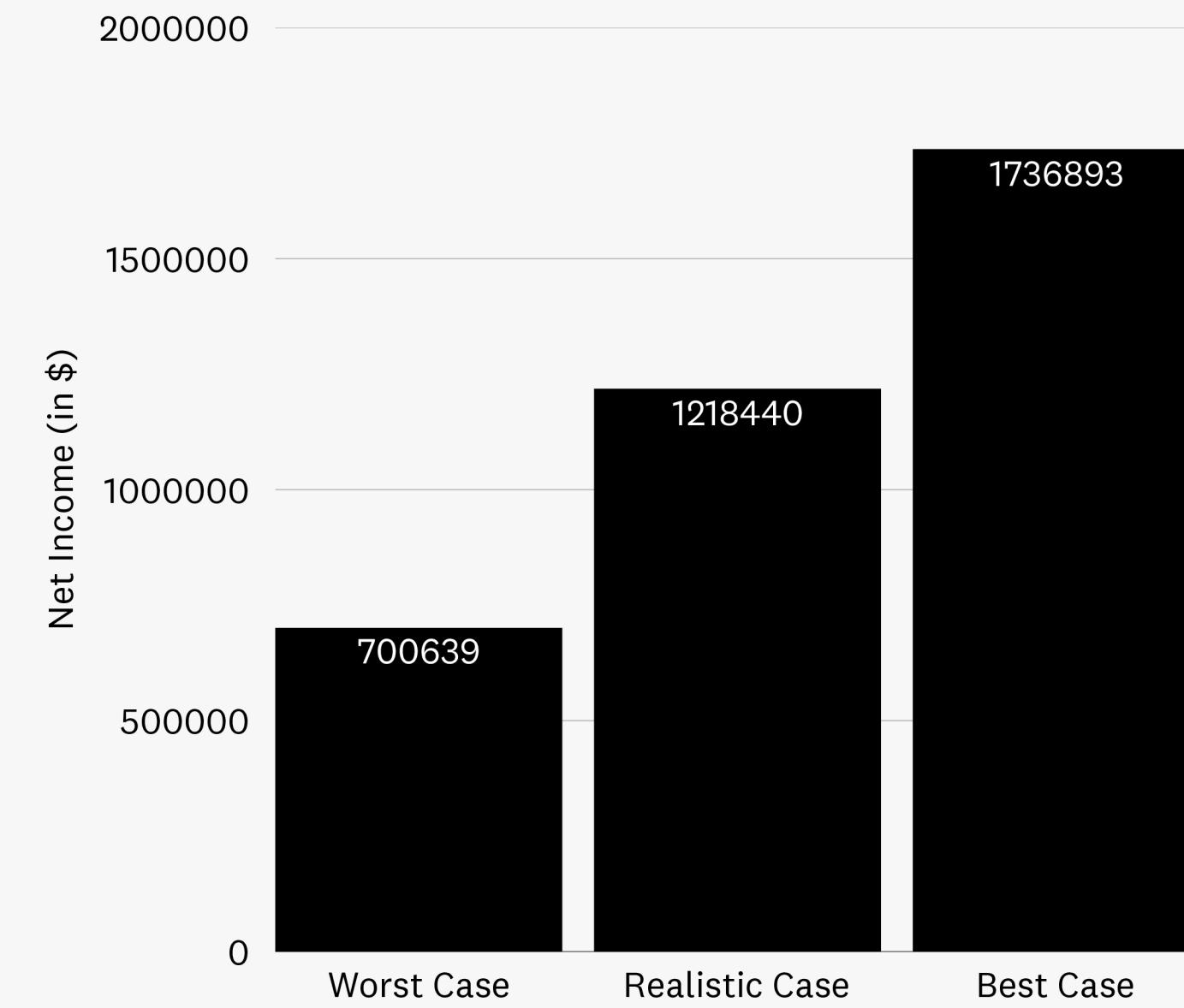
AI Visibility Improvement with Profound

● AI Mentions

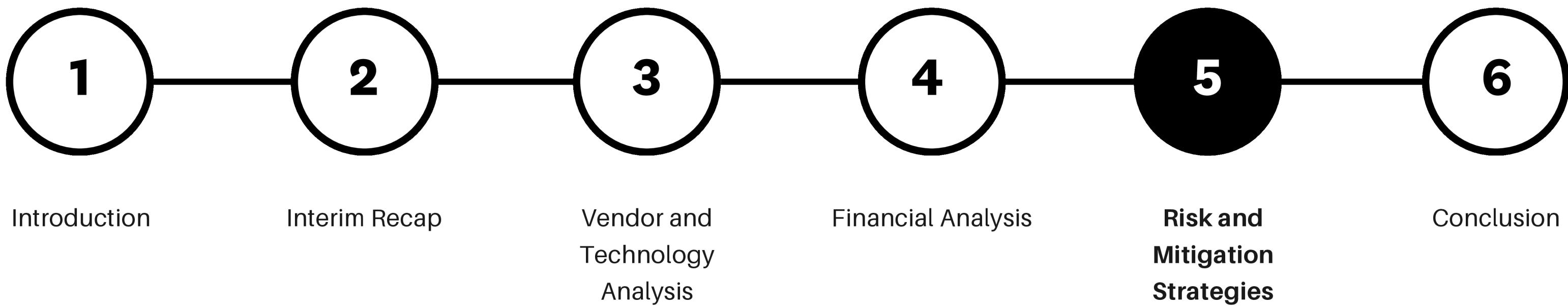


Net Income After Profound

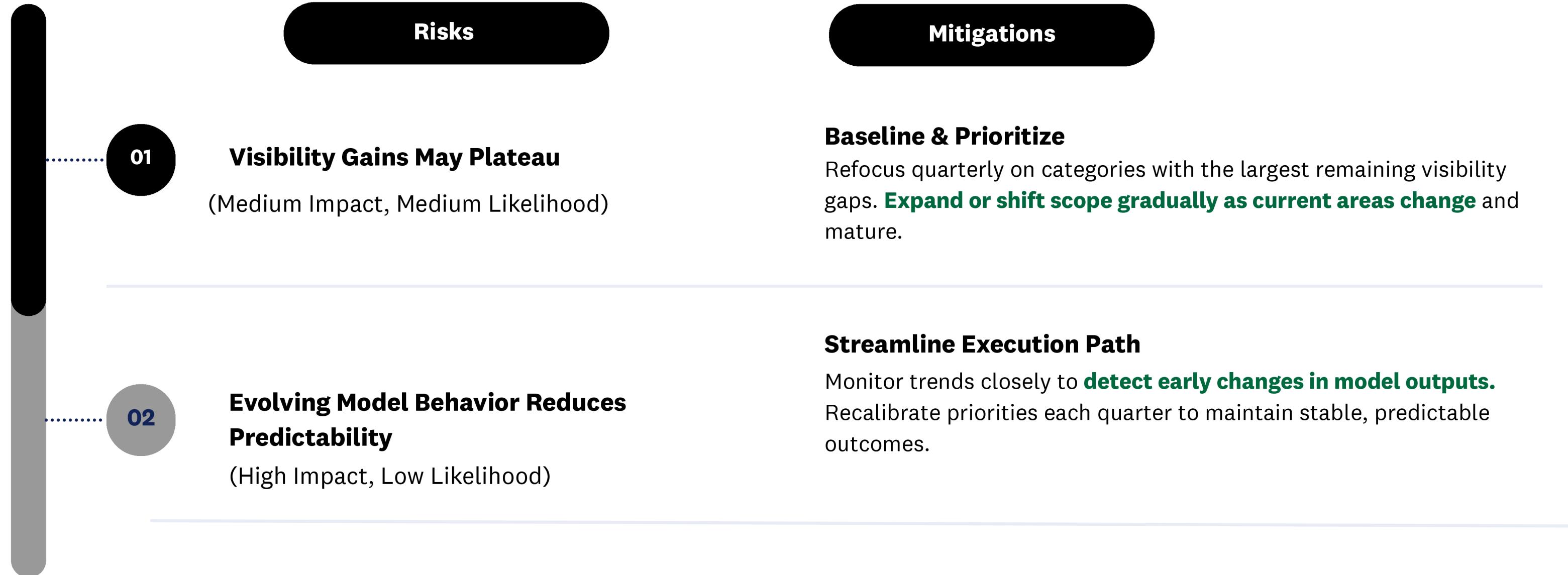
● Net Income



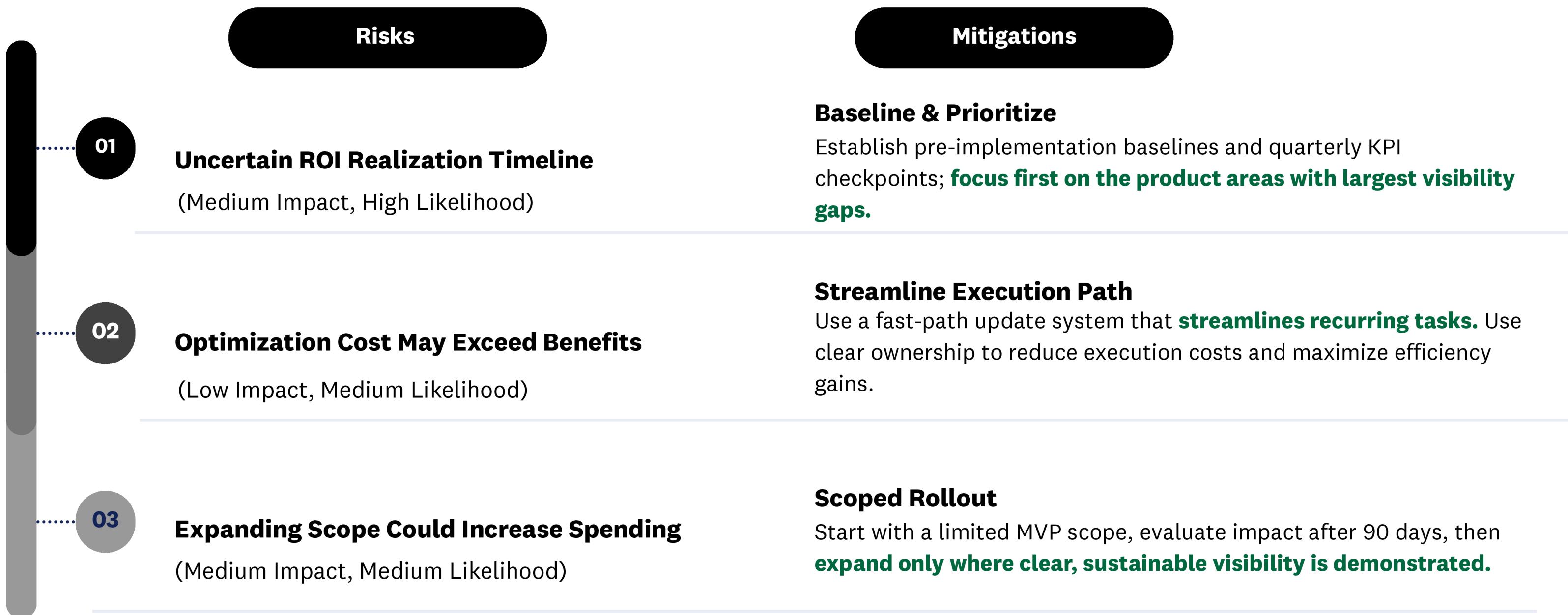
# AGENDA



# Managing two partnering risks is essential for sustained visibility gains

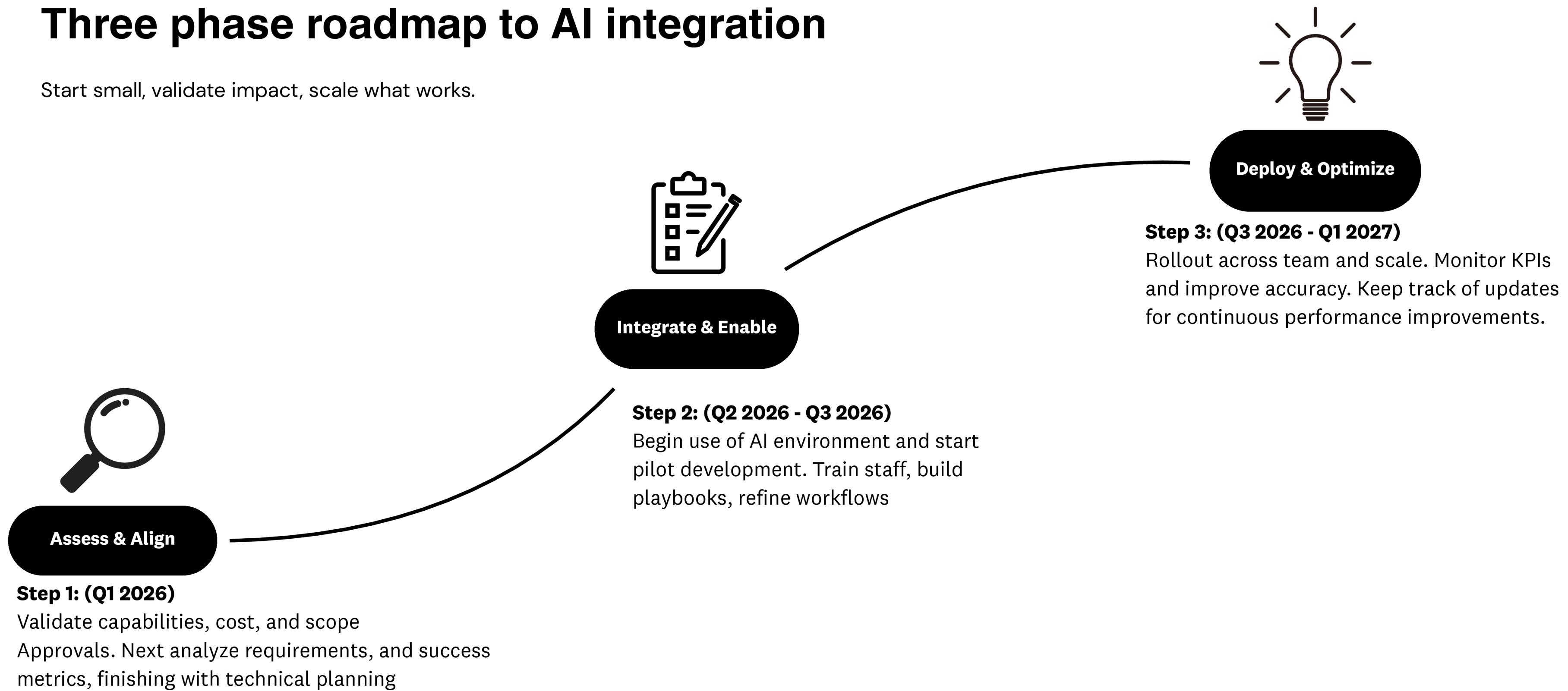


# Three potential monetary-based risks with AI adoption

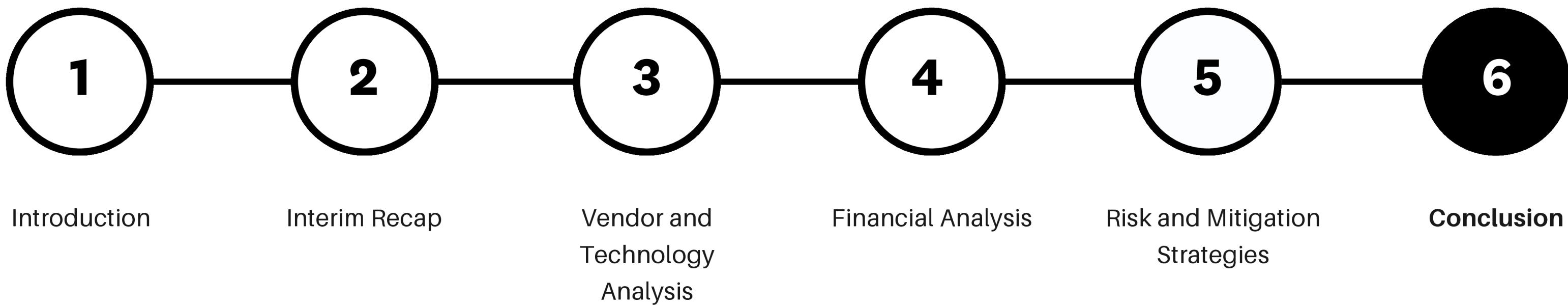


# Three phase roadmap to AI integration

Start small, validate impact, scale what works.



# AGENDA



# Our Recommendation | Profound provides a variety of tools and metrics to track and improve LLM visibility

Financial Institutions Can Invest Into Profound to Monitor and Optimize LLM Visibility for Business Credit Cards



**Track Metrics**



**Compare against Competitors**



**Content Optimization**



**Persona based results**

With the tools provided by Profound Financial institutes will be able to spot shortcomings & maximize current position all while monitoring competitors

