AISO Studio

Marketing Agency Guidebook

How to use AISO Studio to win clients, serve clients, and grow your agency.

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1. Understanding Your Context

Before using any tool, know your context. Understanding where you are in the client relationship determines which tools and strategies will be most effective.

Context	You Are...	Your Goal
Cold Prospecting	Auditing a prospect's site for the first time	Create urgency, show value, get the meeting
Warm Lead	Following up with someone who showed interest	Build proposal, compare competitors, close the deal
New Client Onboarding	Just won the account	Set baseline, create strategy, show quick wins
Active Client Service	Delivering ongoing work	Track progress, create content, show ROI
At-Risk Retention	Client hasn't engaged in 30+ days	Re-engage, show value delivered, prevent churn

2. Workflow: Winning a Cold Lead

> **The Situation:** You found a prospect (maybe through lead discovery, referral, or manual research). You want to turn them into a client.

Step-by-Step Playbook

STEP 1: Run the Audit

Where: /dashboard/audit

Action: Enter their URL and click "Full AISO Audit"

You'll get:

- AISO Score (AI readiness)
- WCAG Accessibility Score
- AEO, SEO, Readability, Engagement breakdown
- Fact-check analysis

What to look for:

- Scores below 70 = strong sales opportunity
- Critical WCAG issues = compliance risk angle
- Low AEO = "invisible to AI" pitch

STEP 2: Compare Against Competitors

Where: /dashboard/audit/compare

Action: Add 2-3 of their competitors

This creates:

- Side-by-side score comparison
- Ranking visualization
- AI-generated sales pitch highlighting gaps

> **Sales Angle: "You're ranked #3 out of 4 in your space for AI visibility"**

STEP 3: Add to Pipeline

Where: Click "Add to Pipeline" or go to /dashboard/pipeline

This lets you track the opportunity, set follow-up reminders, and generate proposals later.

STEP 4: Generate Proposal

Where: /dashboard/pipeline → Click lead → "Generate Proposal"

The proposal includes:

- Current state analysis
- Recommended services
- ROI projections (score improvement → traffic → leads → revenue)
- Pricing options

STEP 5: Send & Follow Up

Where: Lead profile → Emails tab

Recommended Email Sequence:

Day	Action
Day 0	Send audit summary + "I found some issues"
Day 3	Send competitor comparison
Day 7	Send proposal with ROI projections

3. Workflow: Serving an Existing Client

> **The Situation:** You won the account. Now you need to deliver value and prove ROI.

Step-by-Step Playbook

STEP 1: Set Baseline

Where: /dashboard/audit

Run comprehensive audit on their site. Save this as the "before" snapshot. You'll compare against this later.

STEP 2: Create Content Strategy

Where: /dashboard/strategies/new

Generate AI-powered content strategy with inputs: Website URL, Business type, Target audience, Content goals, Location (for local SEO/GEO).

STEP 3: Produce Content

Where: /dashboard/strategies/[id] → Topics → "Write"

Generate blog posts with AISO optimization. Each post is fact-checked, AEO optimized, SEO optimized, and readable.

STEP 4: Track Progress

Where: /dashboard/clients → Client Profile → "Progress" tab

View before/after comparison showing first audit vs latest audit, score improvements, and trend visualization.

STEP 5: Report to Client

Where: Various export options

Download audit PDFs, export comparison reports, and share strategy documents.

4. Workflow: Retaining At-Risk Clients

> **The Situation:** A client hasn't engaged in 30+ days. They might be losing interest or considering competitors.

Step-by-Step Playbook

STEP 1: Check Client Health Dashboard

Where: /dashboard/clients/health

Status	Indicator	Meaning
■ Healthy	Green	Audited within 30 days
■ Attention	Yellow	30-60 days since last audit
■ At-Risk	Red	60+ days since last audit
■ New	Blue	No audits yet

STEP 2: Run Fresh Audit

Where: /dashboard/audit?domain=[client-domain]

Look for: What's improved? What new issues appeared? How do they compare to competitors now?

STEP 3: Create Re-Engagement Report

Compile progress report showing: baseline, current state, delivered value, and recommended next steps.

STEP 4: Schedule Check-In

Talk Track:

1. "Here's what we've accomplished together"
2. "Here's the ROI you've seen"
3. "Here's what's next to keep momentum"

5. Tool Reference by Use Case

Quick reference for finding the right tool for any task:

I want to...	Tool	Path
Audit a website	AISO Audit	/dashboard/audit
Audit multiple pages	Batch Audit	/dashboard/audit/batch
Check accessibility only	WCAG Scan	Audit page → "WCAG Only"
Compare against competitors	Competitor Compare	/dashboard/audit/compare
Find new prospects	Lead Discovery	/dashboard/leads
Manage sales pipeline	Pipeline	/dashboard/pipeline
Generate a proposal	Proposal Generator	Pipeline → Lead → Proposal
Create content strategy	Strategy Generator	/dashboard/strategies/new
Write a blog post	Post Writer	Strategy → Topic → Write
Improve existing content	Content Rewriter	Audit → "Rewrite"
Track client health	Health Dashboard	/dashboard/clients/health
View client progress	Client Profile	/dashboard/clients → Select
Manage tasks	Tasks	/dashboard/tasks
Store assets	Vault	/dashboard/assets
Check my usage	Settings	/dashboard/settings

6. What's Next Recommendations by Context

This section defines what actions should appear in "What's Next" panels based on context.

After Audit: Cold Lead Context

Indicators: URL not associated with existing lead/client

Priority	Action	Why
1	Add to Pipeline	Track the opportunity
2	Compare vs Competitors	Create urgency with ranking
3	Generate Quick Proposal	Strike while iron is hot

After Audit: Existing Client Context

Indicators: URL matches existing client domain

Priority	Action	Why
1	View Progress	See before/after improvement
2	Create/Update Strategy	Plan next content
3	Generate Report	Show value delivered

After Audit: Score-Based Recommendations

Score Range	Priority Actions
Low Score (<60)	1. Compare vs Competitors ("falling behind" angle) 2. Generate Proposal 3. Add to Pipeline
High Score (>80)	1. Batch Audit Site (find weak pages) 2. Create Strategy (maintain lead) 3. Competitor Watch

After Strategy Creation

Priority	Action	Why
1	Write First Post	Start delivering value
2	Share with Client	Get alignment
3	Set Calendar	Plan publishing schedule

After Post Creation

Priority	Action	Why
1	Audit the Post	Verify quality
2	Export to CMS	Publish it
3	Write Next Post	Keep momentum

7. Subscription Tiers & Feature Access

Starter Tier

✓ Single user
✓ 10 audits/month
✓ 5 strategies/month
✓ Basic reports

What's Next emphasis: Upgrade prompts when hitting limits

Professional Tier

✓ Team access (3 users)
✓ Unlimited audits
✓ Unlimited strategies
✓ White-label reports
✓ Client portal

What's Next emphasis: Full feature set, team collaboration

Agency Tier

✓ Unlimited users
✓ API access
✓ Custom branding
✓ Priority support
✓ Advanced analytics

What's Next emphasis: Scale, automation, white-labeling

8. Quick Reference: The AISO Sales Pitch

When talking to prospects, here's the core message:

> *"AI search engines like ChatGPT, Perplexity, and Google SGE are changing how people find businesses. If your content isn't optimized for AI, you're invisible to a growing segment of searchers. We help you get found by both traditional search AND AI assistants."*

Key Stats to Share

- X% of searches now use AI assistants
- AI-optimized content gets Y% more citations
- WCAG compliance affects Z% of users

The AISO Difference

Component	Weight	Description
Fact-Checking	30%	AI prioritizes accurate content
AEO Optimization	—	Structured for AI to quote
Traditional SEO	—	Still matters for Google
Accessibility	—	Required for many industries, good for everyone