

AI Client-Discovery Competitive Brief

Prepared for [REDACTED FIRM] · New York City · Wealth Management

EXECUTIVE DECISION

[REDACTED] is visible for high-level category questions but absent from three high-intent client situations. The next 30 days should focus on one proof page, one service-page clarification, and one source correction before remeasurement.

MARKET BASELINE

#—current position—%response mention rate— / 4assistants naming client

Evidence base: 1,128 responses in the current public Atlas market at generation time. Client figures are redacted.

COMPETITIVE GAP MAP

Buyer situation A
Prompt and business names redacted
Observed gap, competing claims, assistant distribution, and source trail.

Buyer situation B
Prompt and business names redacted
Observed gap, competing claims, assistant distribution, and source trail.

THREE PRIORITIZED INTERVENTIONS

1. **Clarify the decision page.** Owner, supporting evidence, recommended structure, and publication check.
2. **Publish missing proof.** The precise claim or evidence gap observed in the measured responses.
3. **Repair the source trail.** A bounded correction or corroboration step, without promising an assistant outcome.

DELIVERY AND FOLLOW-UP

PDF + Markdown + JSON · 60-minute working session · one remeasurement 30-45 days after agreed changes publish.