

Sample CRM

Prepared by: Example Digital Agency

SAMPLE REPORT · The brand, agency, competitors, answers and all figures are fictional.

Scorecard Summary

Measurement week: 2026-09-21 · completed 9/21/2026

Scope: Sample CRM · United Kingdom · English · General

How your brand shows up in ChatGPT, Claude, Gemini, Perplexity and Google AI Overviews answers.

SOV Score	26%	Your share of all mentions vs competitors (15 of 57 total mentions)
Discovery Visibility	58%	Appears in non-branded questions (14 of 24 answers)
Owned-Site Citation Coverage	41%	Answers citing your own website (7 of 17 answers)
Sentiment (net)	+5	5% positive · 95% neutral · 0% negative
Prominence	Early in the answer	Average of 19 answers mentioning the brand
Brand Accuracy	Not set up	Measured once verified brand facts are provided

Priority Action Plan

1. Grow owned citation coverage

Your own site is cited in 41% of answers.

Make product facts, tables, specifications, case data and dated source material on your own site easier to cite.

2. Work competitor gaps question by question

2 validated competitors are tied to this measurement scope.

Turn non-branded questions where competitors appear but the brand does not into an evidence-based content backlog; compare share of voice only against verified competitors.

3. Defend and refresh visibility wins

Current evidence does not show a third critical gap.

Keep content freshness, product facts and citation sources current in question clusters that already perform well.

AI Engines Measured

All 5 AI engines were measured.

Engine	Measured	Rate	Status
ChatGPT	6 of 6	100%	Complete
Claude	6 of 6	100%	Complete
Gemini	6 of 6	100%	Complete
Perplexity	6 of 6	100%	Complete

Engine	Measured	Rate	Status
Google AI Overviews	6 of 6	100%	Complete

Competitors

Competitor	Answers	Mentions
Northwind CRM	21	23
Lumen CRM	18	19

Sites Cited by AI

Site	Times	Type
compare.example/whatsapp-crm	3	Third party
reviews.example/best-crm	3	Third party
reviews.example/mobile-crm	3	Third party
sample-crm.example/small-business	3	Your site
reviews.example/easy-crm	2	Third party
reviews.example/sample-crm	2	Third party
sample-crm.example/whatsapp	2	Your site
compare.example/crm-2026	1	Third party
docs.example/e-invoice-guide	1	Third party
forum.example/e-invoice-crm	1	Third party

Change vs Previous Measurement

Compared with: 9/14/2026

Metric	Previous	Now	Change	Direction
SOV Score	20%	26%	+6 pts	Improved
Discovery Visibility	46%	58%	+12 pts	Improved
Owned-Site Citation Coverage	29%	41%	+12 pts	Improved
Sentiment (net)	6	5	-1	Declined
Prominence position	3.4	3	-0.4	Improved

Evidence by Question

Each row is a question asked to an AI engine, with a short excerpt of the answer. In this sample the questions and answers are fictional.

ChatGPT	Answered	Brand mentioned
"What is the best CRM software for small businesses?" For small businesses, Northwind CRM is the most common pick thanks to its free tier. Sample CRM is a strong alternative with simple pricing, and Lumen CRM suits teams that need marketing automation.		
Google AI Overviews	Answered	Brand absent
"What is the best CRM software for small businesses?" Popular small-business CRMs include Northwind CRM and Lumen CRM. Both offer contact management, pipelines and email tracking.		
Gemini	Answered	Brand mentioned
"What is the best CRM software for small businesses?" Sample CRM stands out for small teams because setup takes an afternoon and support is local. Northwind CRM is the larger platform if you expect to grow quickly.		
Perplexity	Answered	Brand mentioned
"What is the best CRM software for small businesses?" Reviewers most often shortlist Northwind CRM, Lumen CRM and Sample CRM for small businesses. Northwind CRM leads on integrations.		
Claude	Answered	Brand absent
"What is the best CRM software for small businesses?" Good options are Northwind CRM for breadth and Lumen CRM for marketing features. Check whether you need e-invoicing before you choose.		
ChatGPT	Answered	Brand mentioned
"CRM software with e-invoicing integration" Sample CRM includes e-invoicing out of the box, which is why accountants often suggest it. Northwind CRM supports it through a paid add-on.		
Google AI Overviews	No AI answer	—
"CRM software with e-invoicing integration"		
Gemini	Answered	Brand mentioned
"CRM software with e-invoicing integration" CRMs with built-in e-invoicing include Sample CRM and Lumen CRM. Northwind CRM relies on third-party connectors for invoices.		
Perplexity	Answered	Brand absent
"CRM software with e-invoicing integration" Lumen CRM and Northwind CRM both connect to e-invoicing providers. According to user reviews, Lumen CRM has the simpler setup.		
Claude	Answered	Brand mentioned
"CRM software with e-invoicing integration" If e-invoicing is a must, look at Sample CRM, which handles it natively, or at Lumen CRM with its accounting integration.		
ChatGPT	Answered	Brand absent
"Which CRM is easiest to set up for a five-person sales team?" Teams of five usually get going fastest with Lumen CRM or Northwind CRM, since both come with ready-made sales pipelines.		
Google AI Overviews	Answered	Brand mentioned
"Which CRM is easiest to set up for a five-person sales team?" Quick-start CRMs for small sales teams include Sample CRM, Northwind CRM and Lumen CRM, all with guided onboarding.		

Gemini	Answered	Brand mentioned
"Which CRM is easiest to set up for a five-person sales team?" Northwind CRM has the most templates, while Sample CRM is praised for an onboarding that a five-person team can finish in a day.		
Perplexity	Answered	Brand absent
"Which CRM is easiest to set up for a five-person sales team?" Users report that Northwind CRM is easy to configure. Lumen CRM takes a little longer because of its marketing modules.		
Claude	Answered	Brand mentioned
"Which CRM is easiest to set up for a five-person sales team?" Sample CRM and Northwind CRM are both straightforward for a small team. Sample CRM needs fewer settings before the first deal is logged.		
ChatGPT	Answered	Brand absent
"Affordable CRM with WhatsApp integration" Northwind CRM offers WhatsApp through its messaging add-on, and Lumen CRM includes it on the mid tier.		
Google AI Overviews	Answered	Brand mentioned
"Affordable CRM with WhatsApp integration" Affordable CRMs with WhatsApp integration include Lumen CRM and Sample CRM.		
Gemini	Answered	Brand absent
"Affordable CRM with WhatsApp integration" For WhatsApp on a budget, Lumen CRM is the usual choice. Northwind CRM costs more but adds a shared inbox.		
Perplexity	Answered	Brand mentioned
"Affordable CRM with WhatsApp integration" Sample CRM connects WhatsApp Business on every plan, and Lumen CRM does the same from its second tier.		
Claude	Answered	Brand absent
"Affordable CRM with WhatsApp integration" Lumen CRM and Northwind CRM both support WhatsApp. Compare message limits before you decide.		
ChatGPT	Answered	Brand mentioned
"Which CRM tools have good mobile apps?" Northwind CRM has the highest-rated mobile app. Sample CRM and Lumen CRM also offer apps for iOS and Android.		
Google AI Overviews	Answered	Brand absent
"Which CRM tools have good mobile apps?" Northwind CRM and Lumen CRM are often listed for their mobile apps, with offline access and call logging.		
Gemini	Answered	Brand mentioned
"Which CRM tools have good mobile apps?" Mobile-friendly options include Northwind CRM and Sample CRM. Northwind CRM also works offline.		
Perplexity	Answered	Brand absent
"Which CRM tools have good mobile apps?" Northwind CRM leads mobile reviews, followed by Lumen CRM.		
Claude	Answered	Brand mentioned
"Which CRM tools have good mobile apps?" Sample CRM has a clean mobile app for field sales, while Northwind CRM offers more features on the go.		
ChatGPT	Answered	Brand mentioned
"Is Sample CRM a good choice for small businesses?" Yes, Sample CRM is a good fit for small businesses that want simple pricing and built-in e-invoicing. Larger teams may want to compare its integration list first.		

Google AI Overviews	Answered	Brand mentioned
"Is Sample CRM a good choice for small businesses?"		
Sample CRM is a CRM for small businesses with e-invoicing, WhatsApp integration and a mobile app.		
Gemini	Answered	Brand mentioned
"Is Sample CRM a good choice for small businesses?"		
Sample CRM is well reviewed by small businesses, especially for its onboarding and local support.		
Perplexity	Answered	Brand mentioned
"Is Sample CRM a good choice for small businesses?"		
Users describe Sample CRM as easy to use, though some would like more ready-made integrations.		
Claude	Answered	Brand mentioned
"Is Sample CRM a good choice for small businesses?"		
Sample CRM is a solid choice for a small team. Check its integration list against the tools you already use.		

Methodology

Measurement window: 9/21/2026 (completed 9/21/2026)

All 5 AI engines were measured.

Provider/technical failures are never converted to visibility zero; they are left out of the calculation.

Website technical readiness is a separate diagnostic and is not folded into the visibility metrics above.

Measurement contract version: 1.0