ELLM WHITEPAPER

The GEO Imperative

Building Brand Visibility in the Age of AI-Powered Search, Ads, and Agentic Commerce

Search is shifting from blue links to AI-generated answers, and from human clicks toward agentic transactions. Traditional SEO is necessary but no longer sufficient. This paper lays out the new discovery stack — Generative Engine Optimization (GEO), AI Ads, and agentic commerce — and how Ellm delivers the full loop: baseline, optimize, advertise, monitor, and transact inside AI commerce.

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Executive Summary

The way consumers discover products and make purchase decisions is undergoing the most fundamental shift in digital marketing since Google launched AdWords. Hundreds of millions of people, especially enterprise buyers, now begin their journey inside ChatGPT, Claude, Perplexity, and Google's AI Overviews — not on a traditional search results page. AI engines do not rank ten blue links; they synthesize answers, and only three to five brands are cited in any given response. If a brand is not one of them, it is effectively invisible.

This paper sets out four arguments:

- The shift from SEO to GEO is structural, not cyclical. Gartner projects a 25% decline in traditional search volume and over 50% decline in organic traffic as users migrate to AI-powered discovery. Forty-eight percent of Google queries already trigger an AI Overview.
- There is a measurable, compounding visibility gap. Brands that optimize for AI engines are cited in roughly 18% of AI responses; non-optimized brands appear in about 3% — a six-times gap that widens as AI systems reinforce their own citation patterns.
- The 2026 arrival of the Agentic Commerce Protocol (ACP) and Google's Unified Commerce Protocol (UCP) moves AI from a discovery layer to a transaction layer. Ads inside AI responses and agent-driven checkout are now live or in beta.
- Existing tools do not solve this. Legacy SEO platforms were built for ranking, not synthesis. AI visibility startups offer monitoring without remediation. In-house teams face six-plus platforms, two emerging protocols, and expertise that barely exists.

Ellm is the first platform that connects AI visibility monitoring, optimization, advertising, and transaction-layer infrastructure into a single loop. Brands install a single HTML snippet and gain (i) real-time Share of Model tracking across ChatGPT, Claude, Gemini, Perplexity, Grok, and Google AI Overviews; (ii) platform-specific content optimization that raises citation rates; and (iii) an AI ad platform that deploys sponsored placements and direct-buy integrations as each AI engine opens monetization.

> **The thesis in one line**
>
> The brands AI recommends will win. Ellm makes sure it's yours.

1. The Search Inflection Point

For twenty-five years, brands ran one playbook: buy ads, rank on Google, get clicks, convert. That playbook is breaking. The evidence is quantitative and accelerating.

25%

of search traffic shifting to AI by end of 2026

Gartner

400M+

weekly active users on ChatGPT alone

OpenAI

48%

of Google queries now trigger AI Overviews

BrightEdge

3–5

brands cited per AI answer — there is no page 2

Ellm analysis

The pattern mirrors 1995. AI reached mainstream usage in 2025, and the foundations for agentic commerce are now in place. Amazon grew annual revenue 3,000% in 1996, reaching $1B by 1999; today, the combination of generative engine optimization (GEO) and agentic commerce protocols is positioned to move far faster. McKinsey predicts $750 billion in U.S. revenue flowing through AI-powered search by 2028. Deloitte projects that agentic commerce could drive up to $17.5 trillion in worldwide transactions by 2030.

From SEO to GEO

Generative Engine Optimization (GEO) is the practice of making a brand reliably appear — and win — in AI-generated answers. It differs from SEO in three important ways:

- **Output is synthesized, not ranked.** AI engines combine retrieved content into a single narrative response. Being cited is binary: a brand is included or it isn't.
- **Optimization targets embeddings, not keywords.** Content that matches the semantic vector of a target query has a structural advantage at the retrieval-augmented-generation (RAG) stage.
- **Each engine behaves differently.** OpenAI and Anthropic run their own crawlers; their weighting, recency bias, and source preferences diverge materially from Google's. A one-size playbook produces uneven results.

From discovery to transaction

The second half of the shift is commerce. Yesterday, you could not buy ads on ChatGPT. Today, Shopify is beta-testing AI search ads for its merchants. Tomorrow, everyone with a product or service will want in — and the platforms and tools needed to make that easy for most business owners do not yet exist.

OpenAI and Stripe have launched the Agentic Commerce Protocol (ACP); Google has launched the Unified Commerce Protocol (UCP). These standards are now being written. The brands that plug in first will compound their visibility.

2. The Visibility Gap

The consequence of the shift above is a measurable, widening gap between brands that have adapted and those that haven't.

> **6× visibility gap**
>
> Brands optimized for AI engines appear in roughly 18% of AI responses. Non-optimized brands appear in approximately 3%. Source: BrightEdge, 500K-query analysis.

This gap is not a snapshot; it compounds. Large language models (LLMs) are trained and grounded on the content that AI search tooling has already surfaced. Brands that enter the citation set early become more likely to be cited again — both by the same engine and by others that retrain on its outputs. Conversely, brands absent from AI answers decay in discoverability over time.

Traffic impact already visible

Enterprise customers report organic traffic declines of 25% to 80% as AI search absorbs journeys that previously ended in a Google click. Retail categories have seen 4,700% year-over-year growth in AI-driven traffic, redistributing attention away from traditional SERP (Search Engine Results Page) real estate. These are not theoretical risks; they are current P&L effects.

What gets cited, and why

AI engines optimize for answer quality under a tight latency and token budget. In practice, that means they prefer sources that are:

- Semantically aligned with the query — content whose embeddings sit close to the user's intent vector.
- Structurally clean — clearly delineated Q&A, definitions, comparisons, and structured data are easier to lift.
- Authoritative and recently updated — freshness and trust signals influence retrieval weight.
- Platform-specific — what wins on Perplexity is not identical to what wins on Google AI Overviews.

Winning the citation is not a matter of writing more content. It is a matter of engineering content and site structure to pass retrieval thresholds across multiple engines simultaneously.

3. Why Today's Tools Fall Short

Brands trying to close the visibility gap today typically reach for one of three options. None of them solves the problem end-to-end.

Approach	What it is	Why it falls short
SEO incumbents	Semrush, Moz, Ahrefs and similar tools built for keyword research and Google rankings.	Wrong architecture. AI engines don't rank — they synthesize. Keyword-volume tools cannot tell you whether ChatGPT will cite you.
AI-visibility startups	Profound AI, Siftly and other monitoring-only tools that track brand mentions in AI responses.	Diagnostic only. They tell you where you stand but offer no path to fix it, and no connection to ads or transactions.
DIY / internal teams	In-house marketing or SEO teams building their own GEO capability.	Too fragmented. Six-plus AI platforms, two emerging protocols, and specialist expertise that barely exists yet. Most teams stall.

In short: no existing solution connects AI visibility monitoring, optimization, and commerce in one platform. Brands that want the full stack today have to assemble it themselves from incomplete parts — which is why most don't.

4. The New Discovery Stack: See It, Fix It, Sell It

The new playbook has three integrated layers. Each is necessary; none is sufficient on its own.

SEE IT	FIX IT	SELL IT
AI Visibility Intelligence	**AI Optimization Engine**	**Agentic Commerce & Ads**
Understand how every major AI engine perceives your brand in real time — by query, by geography, by competitor.	Translate visibility data into platform-specific content and structural changes that raise citation rates. Monitoring	Capture the sale when an AI agent is ready to buy on behalf of a consumer, and place sponsored content where AI

Without measurement, GEO is guesswork.	without remediation is a scoreboard without a team.	engines monetize. Visibility without commerce infrastructure leaves revenue on the table.

The three layers form a loop. Measurement shows where a brand is under-cited. Optimization closes that gap. Commerce infrastructure captures the economic value when the citation converts into an intent to buy. Remove any one layer and the system breaks.

5. The Ellm Platform

Ellm is a full-stack GEO and agentic-commerce platform built around the three layers above. Brands sign up, deploy a single HTML snippet, and begin seeing results within a week.

5.1 AI Visibility Intelligence — "Share of Model"

Ellm's proprietary Share of Model metric measures how often, and how prominently, a brand is cited across ChatGPT, Claude, Gemini, Perplexity, Grok, and Google AI Overviews. The dashboard provides:

- Real-time tracking of brand presence by platform, query, geography, and model version.
- Competitive benchmarking that shows exactly how a brand ranks against direct competitors inside AI responses.
- Email alerts for notable movements — a competitor overtaking the brand in a high-value query, a sudden drop in citation rate, or a new entrant.
- Unified visitor tracking that attributes site visits to AI search, separated by organic and paid channels, so ROI is measurable.

5.2 AI Optimization Engine (AEO/GEO)

Monitoring without remediation is diagnostics, not a solution. Ellm closes the loop with a platform-aware optimization engine:

- Platform-specific recommendations — ChatGPT and Google AI Overviews are optimized differently; Ellm respects those differences.
- An HTML snippet and plugin that inject structured FAQ and answer content tuned for the RAG retrieval stage of each target query.
- On-demand content rewriting that optimizes against the popular embedding models used by production LLMs.

- CMS plugins for WordPress and Shopify, so deployment takes minutes, not sprints — with no developer required.

5.3 Agentic Commerce & AI Ad Platform

The third layer closes the loop from discovery to transaction. This is where GEO becomes a revenue line rather than a brand-awareness metric.

- The first ad platform purpose-built for AI search — sponsored placements generated and deployed from a single dashboard in a few clicks.
- Instant-checkout integration via the Agentic Commerce Protocol (OpenAI / Stripe) and the Unified Commerce Protocol (Google), enabling direct-buy inside AI responses as each engine opens up.
- Cross-platform campaign performance monitoring inside Ellm, with automated spend reallocation to the best-performing ad groups and engines.
- Transparent economics: Ellm charges a flat 3–5% of ad spend on ads routed through the platform, aligned with customer ROI.

> **One platform. Three capabilities. Discovery to transaction.**
>
> Ellm is the full stack for the AI-powered commerce era — the only solution today that connects visibility, optimization, and commerce in a single loop.

6. How Ellm Works

AI search operates as a two-stage process. First, the engine issues one or more internal calls to a retrieval system (often Bing, Google, or a proprietary index). Second, it composes an answer by combining the retrieved passages with its own reasoning. Ellm targets both stages.

Step 1 — Query discovery

When a brand signs up and clicks "Try Ellm," the platform scrapes the landing page plus the landing pages of the brand's competitors. It then determines the set of LLM queries most relevant to the brand's category.

Step 2 — Baseline measurement

Ellm runs those queries against the major AI engines and records which brands are cited, how often, and with what framing. This baseline becomes the Share of Model view the customer sees on day one.

Step 3 — Embedding-aligned content generation

For each target query, Ellm generates structured FAQ and answer content whose embeddings sit as close as possible to the query's intent vector. This content is designed to clear retrieval thresholds at the RAG stage and to influence narrative framing during answer synthesis.

Step 4 — One-snippet deployment

The optimized content ships as a single HTML snippet the customer pastes into the landing page — or auto-installs via the Ellm plugin on WordPress, Shopify, and major CMS platforms. No engineering work required.

Step 5 — Measurement and iteration

The dashboard tracks Share of Model before and after deployment, by query and by platform. Customers typically see measurable GEO lift within a week. Optimization then continues as engines and competitor content evolve.

> **What customers see**
>
> A single dashboard showing citation rate across ChatGPT, Claude, Gemini, Perplexity, Grok, and Google AI Overviews — benchmarked against named competitors, refreshed automatically, and tied to attributable site traffic from AI search.

7. Market Opportunity

Ellm sits at the intersection of several rapidly-compounding markets. Each alone would be material; together they constitute one of the largest category-creation opportunities in digital marketing since the emergence of paid search.

$1B → $17B

GEO services market growth, 40.6% CAGR through 2034

Industry analyst consensus

$52B

AI search engine market size by 2032, up from $15.2B in 2024

Market research

$750B

U.S. revenue driven by AI-powered search by 2028

McKinsey

$17.5T

Worldwide agentic commerce market by 2030

Deloitte

Why the convergence matters

GEO tools alone address a multi-billion-dollar market. But GEO is upstream of two much larger value pools: AI-search advertising and agentic commerce. Every brand that invests in GEO visibility today becomes a prospective buyer of AI-search ads tomorrow, and a prospective participant in direct-buy agentic commerce soon after. A platform that wins the visibility layer is well-positioned to win the ad and commerce layers as each opens up.

Initial beachhead

Ellm's current go-to-market focuses on SMBs and regional businesses that are already investing in SEO and paid search but have not yet explored GEO or LLM-based ads. These customers benefit disproportionately from a self-serve, snippet-based product, and they provide the query volume and case-study data needed to expand upmarket.

8. Business Model

Ellm's revenue compounds across three layers that mirror the platform's capability stack.

Layer	Stream	Description
Core revenue	**SaaS subscriptions**	Tiered plans covering visibility tracking (free tier), Pro optimization, and Enterprise support. Self-serve to mid-market to enterprise motion.
Growth engine	**AI ad platform**	Sponsored placements alongside AI responses. Campaigns deploy in a few clicks to Google, ChatGPT, and other engines as they monetize. Ellm takes 3–5% of ad spend — the AdWords model for AI search.
Long-term	**Transaction revenue share**	A percentage of sales facilitated through AI-agent direct-buy and instant checkout via ACP and UCP. Revenue scales with agentic commerce.

The sequencing matters. SaaS subscriptions open the door and establish data-gathering relationships with customers. The ad platform layers high-margin revenue on top of that base as AI engines turn on monetization. Transaction revenue scales with the broader agentic-commerce market — projected to be measured in the trillions by 2030.

9. Why Now

The window for category definition in GEO and agentic commerce is open now and will close quickly. Four forces are converging:

- **The protocols are being written.** ACP (OpenAI / Stripe) and UCP (Google) define how AI agents transact. Brands that integrate first shape the standards; brands that integrate later inherit them.
- **AI ads are flipping from off to on.** Shopify is beta-testing AI search ads. ChatGPT ads are expected to reach general availability in 2026. The infrastructure to run campaigns at scale does not yet exist for most businesses.
- **Visibility patterns are compounding.** Every month a brand is absent from AI responses, the harder it becomes to enter the citation set. Early movers entrench; late movers catch up at increasing cost.
- **Traditional SEO budgets are re-allocating.** Enterprise marketers are already seeing 25–80% declines in organic traffic. Procurement for GEO tooling is active today in CMO offices that had no GEO line item a year ago.

> **The window is now**
>
> The protocols are being written. The category is forming. This is a window, not a standing invitation.

10. Conclusion

The shift from ranked results to synthesized answers — and from human clicks to agent-driven transactions — is the biggest structural change in digital discovery since the launch of AdWords. Traditional SEO tools were built for a world that is receding. AI-visibility monitoring tools describe the problem without solving it. In-house teams face a stack that is both too fragmented and too new to piece together reliably.

Ellm was built for this moment. It is the only platform that connects visibility measurement, platform-specific optimization, AI-search advertising, and agentic commerce in a single loop — and it is shipping today. Brands that begin now will compound their visibility into the category-defining decade for AI-powered commerce. Brands that wait will pay exponentially more to catch up, if they catch up at all.

The brands AI recommends will win. Ellm makes sure it's yours.

About Ellm

Ellm, Inc. is building the AI Visibility and Agentic Commerce Infrastructure for the post-search era. Founded in 2024, the company is headquartered in Salt Lake City, Utah, with a distributed team. Ellm is currently in live beta with over 100 sign-ups and a growing base of paying customers.

Leadership

Sam Brotherton — Founder & CEO

Previously led advertising and search ML/AI teams at Google, Reddit, Nextdoor, and Yahoo, including as Director of AI Search Engineering. Fractional CTO experience at more than 40 technology startups from pre-seed to IPO. Harvard graduate with dual degrees in Mathematics and Chinese.

Toby Brotherton — Co-founder & CTO

More than ten years building, scaling, and leading remote software development teams. Most recently a founding engineer at an AI e-commerce analytics startup, where he helped drive product-market fit and early revenue growth.

Shannon Smith – COO & President

With over two decades of deep tech start-up experience on the West Coast, Shannon is a serial entrepreneur with a global perspective and network. Successful experience finding, developing, and scaling high-growth opportunities, raising over $35M in funding and driving $50M+ in early revenue.

Advisors

- Michael Solomon — 10x Management Co-founder
- Rishon Blumberg — 10x Management Co-founder
- Shawn McGaff — 20+ years as a startup CMO

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