

How answer engines change the way enterprise buyers find suppliers

Enterprise buyers have always built a shortlist before any supplier hears of them. This paper asks what changes when part of that stage happens inside an answer, and what stays as it was.

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IN BRIEF

Answer engines move part of the enterprise shortlisting stage inside an answer that names suppliers and cites sources, in a conversation the supplier never sees. Claims are weighed against what independent sources say, consistency across sources matters more than any one page, and the answer becomes the unit of competition. Procurement, people and evidence still decide.

KEY FINDINGS

1. The shortlist can form inside an answer, and the supplier sees neither the question nor the reading

The products interpret the question, retrieve pages, compose an answer and show the sources they used. A buyer satisfied by the answer has no reason to open a supplier's site, and the answer may frame the need before it names anyone, which is our inference.

2. A supplier's claims are weighed against what independent sources say

What a supplier says about itself is evidence of what the supplier says. That a composed answer leans on other people's pages is our inference from the mechanism, and no provider documents a rule that favors third-party sources.

3. Consistency across sources matters more than any one page

An answer is assembled from pages written for other purposes, at other times, by other people. If they disagree about what the firm does, the answer must choose one account or blur them. Markup is not the lesson: the visible facts must agree wherever they are stated.

4. The answer, not the ranking, becomes the unit of competition

An answer is composed anew for each question, engine and day, and each member of a buying group asks different questions. The only measure is a dated record of named questions put to more than one product.

5. Being named is not being chosen, and being named for work the supplier cannot show costs more than not being named

A contract still passes through written criteria, references, terms and sign-off. At evaluation the buyer checks what was claimed, and people still form their views through conversations and references that no summary replaces.

6. The first decisions belong to leadership: access, one account of the firm, and a routine of testing

The paper cannot say how often buyers rely on an answer for this stage. The cost of being wrong is not symmetric, which argues for a decision from leadership and a small, dated test.

What does this paper ask, and why should a leader care now?

Before an enterprise buyer contacts a supplier, a stage of the purchase has usually run its course. Someone has named a problem, a group has formed around it, and that group has built a list of suppliers and decided what it believes about each. The supplier is absent from this stage because nothing in it requires the supplier to be there.

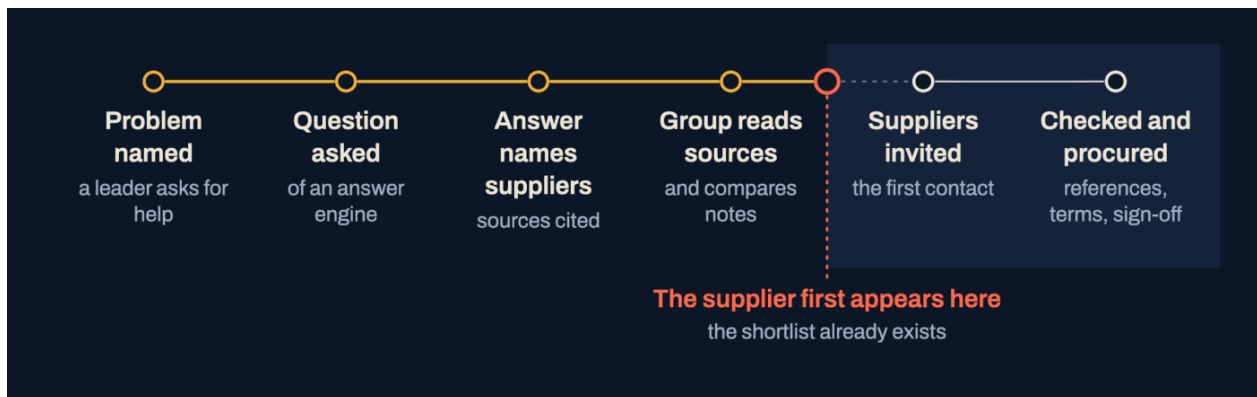
Public procurement rules show how old and how formal the stage is. The US Federal Acquisition Regulation, at 10.001, requires agencies to conduct market research before they develop a requirements document and before they solicit offers above a stated threshold, and it names the purposes, among them to determine whether sources capable of satisfying the requirement exist. Section 10.002 lists the techniques: contacting knowledgeable individuals, reviewing the results of recent research, reading the catalogs and product literature that suppliers publish, and obtaining source lists. The UK Cabinet Office's Sourcing Playbook of June 2023 describes early engagement with the market in its own terms, and adds a constraint that matters later in this paper: preliminary consultation must be handled so that no supplier gains a preferential advantage.

A private enterprise has no such rule, and we do not claim these documents describe private buying. We use them for one narrow point. The stage before contact is a recognized part of buying, it runs on what the buyer can read, and the buyer forms a view before any supplier speaks. Our own delivery experience points the same way: the buyers and leaders we speak with usually have a list in mind before they invite anyone.

An answer engine, in this paper, is an assistant or a search feature that composes a written answer from retrieved pages and shows the sources it used. It changes where part of that stage happens. A summary names some suppliers, cites some pages, and is read in a conversation the supplier never sees. Exhibit 1 shows the route, and the point at which the supplier first appears in its own right comes after the shortlist exists.

EXHIBIT 1

The route of an enterprise purchase, and where the supplier first appears



Everything before the break happens without the supplier. The engine sits in the middle of that stretch, between the question and the reading.

The question is what this changes for a supplier, and what it does not. The paper is written for a chief executive or a head of marketing who must decide whether the matter deserves leadership attention, and not for the person who would do the technical work. Our report on being found by buyers who use AI assistants covers how a firm becomes findable and how to fix access. This paper takes the buyer's route and the supplier's position as its subject.

It argues that the shortlist can form without a visit, that claims are weighed against what independent sources say, that consistency across sources matters more than any single page, and that the unit of competition becomes the answer, not the ranking. It then says what stays as it was, because an argument about change fails if it overstates the change.

Method and limits

This paper is an argument built on material of different kinds, and each kind is labeled where it is used. The first kind is the public documents of two procurement rule-makers, read for the passages cited, which show that the stage before supplier contact is recognized and governed. The second is the providers' own documentation of how their products retrieve and cite pages: Google Search Central, OpenAI, Anthropic and Perplexity, read on 20 October 2026. The third is one study by the Pew Research Center, charted from a stored copy of its published figures. The prose says what the study measured and does not repeat its figures. The fourth is the firm's delivery experience, described as pattern and mechanism and marked as such.

Where a statement is an inference, the sentence says so. The paper makes no claim about how widely enterprise buyers use answer engines, because we found no primary source we could read that measures it. Analyst surveys of business buyers exist. The releases we tried to read were behind a paywall or could not be opened, so none is cited.

- No assistant was tested for this paper and no rate of appearance was measured.
- The Pew study followed Google searches by adults in the United States in March 2025. It did not study enterprise buyers, other engines or the buying of services, and the way a feature appears can change over time.

- The procurement documents describe public buyers. Private buying has no equivalent rule, and our account of it rests on delivery experience.
- The providers document access and citation. They do not document how one source is chosen over another, so what the paper says about that is inference.
- The documents change without notice, and each was read on one date.
- Engagements are under NDA, so no client material appears.

Can a shortlist form without a visit to any supplier's website?

It can, because of how the products are built. The providers describe a common sequence: the product interprets the question, searches or retrieves pages, composes an answer, and shows the sources it used. Perplexity's help center describes it as understanding, searching, and summarizing with numbered citations. Anthropic's documentation says Claude determines when to search from the prompt, runs the searches, and ends its turn with a response that cites its sources, and that citations are always enabled for its web search tool. Google says AI Overviews and AI Mode may issue related searches across subtopics and data sources, which it calls query fan-out, and so can display a wider and more diverse set of links than classic search. OpenAI's documentation for its API search tool, which is a developer product and not the ChatGPT application, says inline citations are included by default and that its sources field lists every URL the model consulted, not only those it cited.

In each case the reader meets the answer before any source. A buyer who is satisfied by the answer has no reason to open a supplier's site, and a buyer who does open a source opens one the answer chose. That is the first change: the shortlist, and the first description of each name on it, can form inside the answer. The supplier sees neither the question nor the reading.

The answer may also frame the need before it names anyone. A buyer who asks about a problem can be given a description of the category of supplier that addresses it, and the shortlist then forms inside that category. A supplier whose offer does not match the category as the answer defines it can be capable and still unnamed. This is our inference from how the answers are composed, not a documented behavior, and it is the reason the framing row of the table below is not empty.

The change does not touch every stage. Exhibit 2 goes through the stages of a purchase and sets out where a supplier could act before and where it can act now.

[Perplexity: How does Perplexity work?](#)

[Anthropic: Web search tool](#)

[Google Search Central: AI features and your website](#)

[OpenAI: Web search guide for the API](#)

EXHIBIT 2

The stages of a purchase, before and with an answer engine

Stage	Where the supplier could act before	Where the supplier can act with an engine in the route	What does not change
Problem named	Nowhere. The problem is internal to the buyer.	Nowhere. The problem is still internal.	A leader owns the problem and the budget.

Need framed	Through published research and talks that colleagues, peers and analysts read.	The same, and the framing may now be repeated back by an answer that describes the problem and the kinds of supplier that address it.	The group decides what it is buying.
Shortlist built	Through search presence, referrals and lists, where the buyer chooses what to open.	Through whether an answer names the supplier, and in whose words, as well as the routes before.	Referrals and past dealings still add names.
Claims weighed	Through its own pages, which the buyer sets against other pages by opening several.	Through what the answer sets beside the supplier's claim, in one view, before the buyer opens anything.	Independent evidence outweighs self-description.
Suppliers contacted	Through the first meeting, where the buyer's view is still forming.	Through the first meeting, where the buyer may arrive with a summary the supplier did not write.	Meetings, demonstrations and references.
Procured	Through the written response to written criteria.	The same.	Procurement rules, contracts and sign-off still apply.

The stages at the start and the end change least. The weight falls on the shortlist and on how claims are weighed.

The shortlist row and the claims row carry the argument. In the shortlist row, a supplier used to act on its search presence and its referrals. It can now also act on whether an answer names it. In the claims row, the buyer used to weigh a supplier's page against other pages by opening several, and an answer now does a first pass of that weighing in one view.

We do not know how often buyers rely on an answer for this stage, and the paper does not need to. The cost of being wrong is not symmetric. A supplier that prepares for a habit that does not spread has written clearer pages and aligned its facts, which a human reader also gains from. A supplier that ignores a habit that does spread learns of its absence from a pipeline it cannot see. That is a reason to give the matter a decision from leadership and a small, dated test, and not a large program.

Why are a supplier's claims weighed by what independent sources say?

An engine that answers a question about suppliers composes from the pages it retrieves, and the supplier's own page is one of them. What a supplier says about itself is evidence of what the supplier says. A system that must write a sentence about what a firm is known for has little else to set against it than other pages.

The documents give a hint of this. Anthropic lists, among the cases in which Claude searches, requests about specific organizations, people or products that might have changed. A buyer who asks Claude about a named supplier therefore sets off a search of the web at large, and not only of that supplier's site. Google's guidance on people-first content says that trust is the most important of the aspects it lists, and asks who made a piece of content, how, and why. It also says that the framework behind that list is not itself a specific ranking factor, and none of the provider pages we read documents a rule that favors third-party sources. That a composed answer leans on other people's pages is our inference from the mechanism, and a reader should test it.

Exhibit 3 sets out the layers of evidence an engine can weigh. The lowest layers are the supplier's to write: access, which the providers document, and plain pages that say what the firm does, for whom. The next is the supplier's to publish: method, research and stated limits, which give a reader, human or machine, something to check. The layer above is not the supplier's to write at all. It is what others say in public: press, registries, directories, standards bodies, and statements by customers who choose to make them.

Buyers already work this way in the public rules. Section 10.002 of the Federal Acquisition Regulation lists, among its techniques, reviewing the results of recent market research and obtaining source lists from other contracting activities, trade associations and other sources. A buyer who starts from other people's compilations has always treated them as a check on what suppliers say about themselves. An answer engine automates part of that habit and puts it where a busy buying group will meet it first.

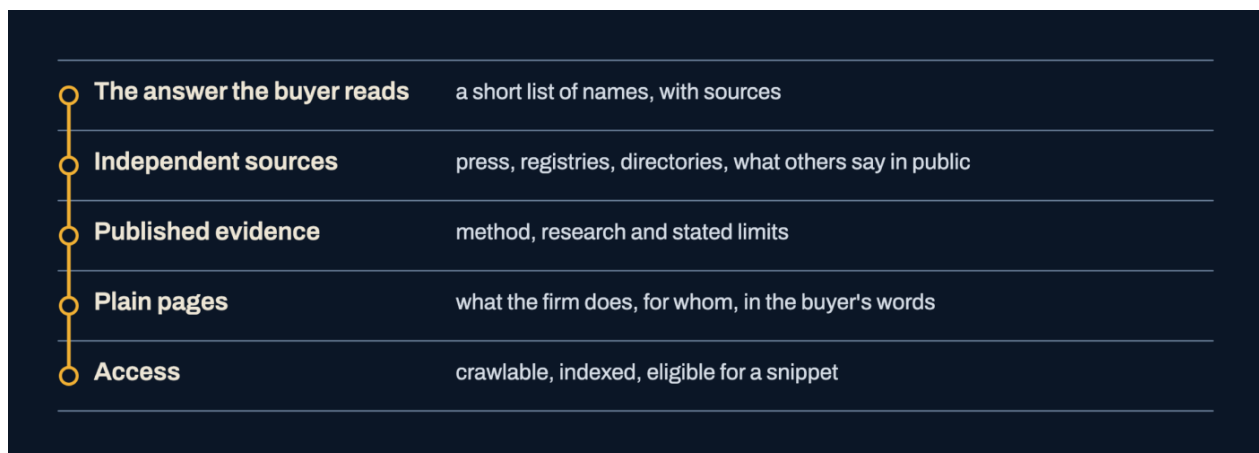
The practical consequence is a change of target. A supplier cannot write the independent layer, but it can publish evidence that others find worth citing, and it can keep the facts in that layer correct where it has a hand in them, such as a directory entry or a registry record. A claim that rests only on the supplier's own pages is likely to be repeated with caution or left out, and a claim that other sources repeat is likely to be stated plainly.

[Google Search Central: Creating helpful, reliable, people-first content](#)

[Anthropic: Web search tool](#)

EXHIBIT 3

Layers of evidence an answer engine can weigh



The supplier writes the lower layers, publishes the middle one and earns the one above it. The buyer reads only the top.

Why does consistency across sources matter more than any one page?

A single question becomes multiple searches. Google says its AI features may issue related searches across subtopics, and each may return a different page. The answer is then assembled from pages written for other purposes, at other times, by other people: a service page, an about page, a sector page, a job advertisement, a profile on a directory. If they disagree about what the firm does, the answer must choose one account or blur them, and the buyer reads whichever it produced.

The providers treat identity as a real problem. Google's guidance on Organization structured data says the markup helps it understand an organization's administrative details and disambiguate the organization in search results. It names the properties: the name, which should match the site name, an alternate name, the legal name, the address of the home page, a logo, and links to the organization's pages elsewhere. Google adds that it does not guarantee that features which use structured data will show up. Its guidance on AI features asks that structured data match the visible text of the page, and says that no special markup is needed to appear. The lesson is not to add markup. It is that the visible facts must agree wherever they are stated.

In delivery work on how firms describe themselves, the pattern is drift. The services page is rewritten, the directory entry is not. A name changes after a reorganization and the old one persists in filings and press. A sector page uses vocabulary the rest of the site does not. None of it matters to a human who arrives at the home page and reads in order. It matters to a system that reads them all at once and has no reason to prefer the newest.

This is why consistency outweighs the quality of any one page. A very good page cannot outweigh the pages that contradict it, and a buyer who asks more than one product may read two different accounts of the same firm. Google notes that AI Overviews and AI Mode may use different models and techniques, so their responses and links can differ. The cost is a firm that is described by its oldest or loosest account, or confused with a similarly named one, in the first conversation a buyer has about it.

[Google Search Central: Organization structured data](#)

[Google Search Central: Introduction to structured data](#)

[Google Search Central: AI features and your website](#)

A position belongs to a page; an answer belongs to a question, an engine and a day.

Why does the answer, and not the ranking, become the unit of competition?

In a ranked list, a supplier competes for a position on a page the buyer scans, and a lower position still earns some attention because the buyer chooses what to open. In an answer, the competition is for inclusion in a composed text, and it is decided separately for each question, because the text is composed anew each time. A position belongs to a page. An answer belongs to a question, an engine and a day.

The Pew Research Center's short read of 22 July 2025 gives a measured view of how often an answer appears. The study followed the Google searches of a panel of adults in the United States in March 2025, ran each search again, and recorded whether Google showed an AI summary at the top of the results. It then compared what people did next on pages with and without a summary. Exhibit 4 shows the share of searches that produced a summary, by kind of search: short searches rarely did, and longer searches, searches written as full sentences and searches that begin with a question word did far more often.

The study concerns everyday Google searches by adults in one country, not enterprise buyers, and it cannot say how a buying group searches. It supports a narrower point. The searches that produced a summary more often are the ones phrased as a situation and a need, and a buying group's research question is usually of that kind. That second step is our inference. It means the questions that matter to a supplier are the long ones, which a keyword list does not capture.

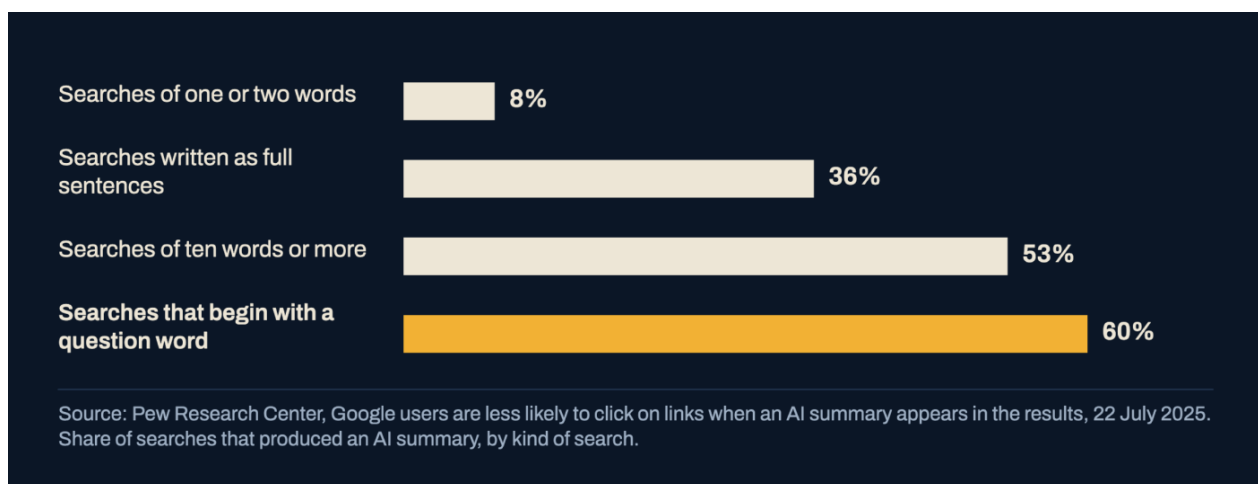
Different members of a buying group ask different questions. The sponsor asks who can do the work. The security lead asks how a supplier handles data. Finance asks about terms. Each question is a separate answer and may name different suppliers, so a supplier can be present for one and absent for another. Google says AI Overviews are shown only when its systems judge them additive to classic search, and that AI Mode is meant for queries that need exploration or comparison. Pew notes that the summary for a given search may change over time.

The result is a different way of knowing where you stand. A rank is a number the supplier can read from a report. An answer has to be asked for. The only measure available is a dated record of named questions put to more than one product, with what each answer said about the firm and which sources it cited. Google reports traffic from its AI features inside the Web search type in Search Console. The pages read for the other providers do not describe a comparable report.

[Pew Research Center: Google users are less likely to click on links when an AI summary appears in the results](#)

EXHIBIT 4

How often Google produced an AI summary, by kind of search



Longer searches and question-like searches produced a summary more often than short ones. A buyer's research question is usually of that kind.

What changes the outcome, and what stays as it was?

The following change a supplier's position, and none is a trick. Google states that there are no additional requirements to appear in AI Overviews or AI Mode and no other special optimizations, and no provider documents a method of being chosen. The work is the same work, done to a higher standard and measured differently. The supplier writes pages that state plainly what it does and for whom, in the words a buyer uses. It publishes the reasoning and the limits behind its claims. It keeps one account of itself wherever it controls the text, and corrects the rest where it can. And it measures by question, on more than one product, on a schedule.

Some things do not change. Procurement still happens. The documents read for this paper describe public buyers. The regulation treats market research as a step that comes before the solicitation of offers, and the Playbook says preliminary consultation must leave no supplier with a preferential advantage. A private

buyer's rules differ, but a contract still passes through written criteria, references, terms and sign-off, and an answer can place a name on a list without winning the work. People still decide. A buying group has a sponsor, a skeptic and a signatory, and each forms a view through conversations and references that no summary replaces. And evidence still wins. At evaluation the buyer checks what was claimed, so a supplier that was named for something it cannot show loses more than one that was never named.

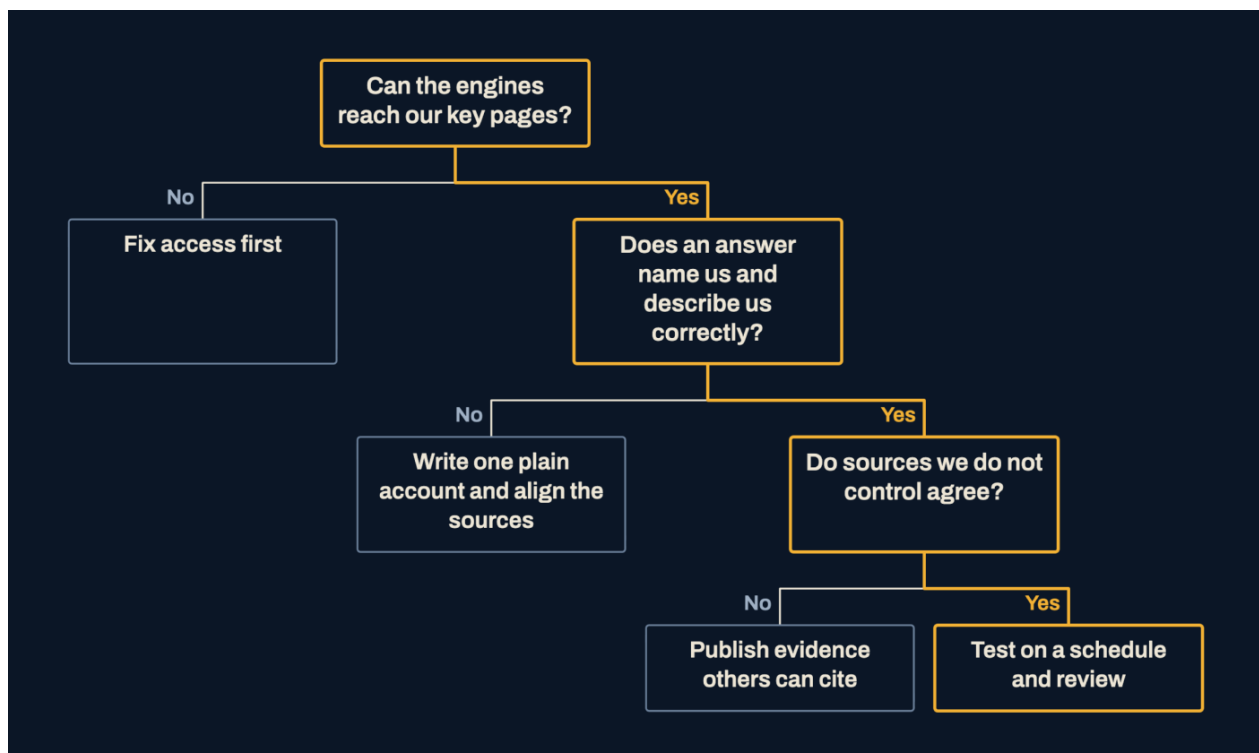
Some of the decisions belong to leadership and not to a technician. The first is the choice between letting retrieval crawlers reach the firm's pages and keeping them out, which the providers document as a separate setting from training. The second is what the firm will say about itself in one account, because that is a statement of position that others will repeat. Both are made once, in writing, and reviewed.

There is also a risk to name. A supplier that pursues presence without accuracy can be named for work it does not do, and the buyer who finds the gap at evaluation discounts everything else it said. The aim is to be described correctly, not to be described often.

Exhibit 5 puts the first decisions in order. It starts with access, because it is documented, cheap and certain. It moves to the description, then to the evidence, and ends in a routine of testing, because the products and their documents change.

EXHIBIT 5

What a leadership team should decide first



Each answer of no names the next piece of work. Only a firm that answers yes at every question moves to routine testing.

WHERE IT GOES WRONG

Presence without accuracy

A supplier that pursues presence without accuracy can be named for work it does not do, and the buyer who finds the gap at evaluation discounts everything else it said. The aim is to be described correctly, not to be described often.

What should a leadership team do, step by step?

1. Name an owner and a date for a decision

The chief executive asks the head of marketing, with a named sponsor on the leadership team, to own how the firm appears in answers. The owner reports on a set date. At the end of this step there is one named person, one sponsor and a date.

2. Write down the buyers' questions

The owner works with sales and with recent buyers to list the questions each member of a buying group asks before first contact, in their own words and at the length they would type. At the end there is a list grouped by role: sponsor, technical lead, security and legal, finance.

3. Ask the products and keep the answers

The owner puts each question to more than one answer engine and records, with the date, which suppliers were named, how the firm was described and which sources were cited. At the end there is a dated record that can be compared with the next one.

4. Fix access and the account

A technical owner reads robots.txt as each crawler would, confirms that key pages are indexed and can show a snippet, and decides on training crawlers separately. The owner and the leadership team agree one plain account of the firm: name, legal name, what it does, for whom. At the end access is confirmed and the account is written down.

5. Publish evidence that others can cite

The firm publishes the method and limits behind its main claims, and corrects the directory entries, registry records and profiles it can edit so that they match the account. At the end there are pages a third party could cite and sources that agree.

6. Review the record each quarter

The leadership team reads the record, compares it with the last, and decides whether to continue, change or stop. At the end there is a short decision log, and a reason for each decision.

How can you check your own position?

- I can name the person who owns how our firm appears in answers.
- We have written down the questions each member of a buying group asks before they contact us, in their words.
- We have put those questions to more than one answer engine in the last quarter and kept the answers with their dates.
- Our firm is named in the answers to the questions where it should be.
- Where we are named, the description matches what we would say ourselves.
- Our robots.txt file allows the retrieval crawlers we intend to allow, and we decided about training crawlers separately.
- Our key pages are indexed and can show a snippet.
- Each service page opens with what the service is, for whom, and what problem it answers.
- Our name, legal name and one-line description are the same on our site and on every directory and profile we control.
- Our main claims link to the reasoning or evidence behind them, with the limits stated.
- Sources we do not control describe what we do, and agree with us.
- Our leadership team has read the record of answers and made a decision on it in the last quarter.

What do readers ask about answer engines and shortlists?

Do enterprise buyers really build their shortlist from AI answers?

The paper cannot say how often. It found no primary source it could read that measures it, and it cites none. Its argument is narrower: the stage before supplier contact already exists, and part of it can now happen inside an answer the supplier never sees.

Does an answer engine believe what we say about ourselves?

The paper infers that an answer weighs a supplier's claims against other pages, and says no provider documents such a rule. The response is to publish method and limits that others can cite and to keep directory and registry entries correct.

What should our leadership team decide first?

Start with access, because it is documented and certain: whether retrieval crawlers may reach your pages, decided apart from training crawlers. Then agree a plain account of the firm, publish evidence others can cite, and set a routine of dated testing, since the products and their documents change.

If an answer names us, have we won the work?

No. Being named is not being chosen. A contract still passes through written criteria, references, terms and sign-off, and at evaluation the buyer checks what was claimed. A supplier named for work it cannot show loses more than a supplier never named.

Sources and notes

Every document below was read on 20 October 2026. Where the document shows a date it is given; where it shows none, the entry says so. The Federal Acquisition Regulation pages were read as published at acquisition.gov on that date.

1. [Pew Research Center, short read of 22 July 2025 on clicks when Google shows an AI summary](#)
2. [Federal Acquisition Regulation, 10.001 Policy \(market research\)](#)
3. [Federal Acquisition Regulation, 10.002 Procedures \(market research techniques\)](#)
4. [Cabinet Office \(UK\), The Sourcing Playbook, early engagement, pages 16 and 17 \(June 2023\)](#)
5. [Google Search Central page on AI features, updated 10 December 2025](#)
6. [Google Search Central guidance on people-first content, updated 5 October 2026](#)
7. [Google Search Central page introducing structured data, updated 10 December 2025](#)
8. [Google Search Central guidance on Organization structured data, updated 8 September 2026](#)
9. [OpenAI overview of its crawlers \(no date shown\)](#)
10. [OpenAI, Web search guide for the API \(no date shown\)](#)
11. [Anthropic help center article on web crawling and how site owners can block the crawler \(updated 7 April 2026\)](#)
12. [Anthropic, Web search tool, Claude API documentation \(no date shown\)](#)
13. [Perplexity, How does Perplexity work? \(no date shown\)](#)
14. [Perplexity page on its crawlers \(no date shown\)](#)

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[Run the AI search visibility assessment](#)

[Read the research on being found through assistants](#)

Write down the five questions your best buyers ask before they call you, and ask them of two assistants this week.

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