SHORTLIST FORMATION IN AI-MEDIATED B2B BUYING

The First-Mover Authority Advantage

How AI pre-selects your competitors before buyers know you exist.

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FOUNDER · AUTHORITY ENGINE

AI AUTHORITY ENGINEERING

EXECUTIVE SUMMARY

The race starts before the gun.

The competition for customer attention no longer begins when buyers start evaluating vendors — it begins before they even know your company exists. Forrester found that 92% of B2B buyers began a purchase with a vendor shortlist, and 41% already had a preferred vendor. Separately, 6sense found that 95% of winning vendors in its 2025 study were on the Day One shortlist. Neither survey establishes that AI caused those initial selections.

Our mixed-method study — Authority Engine audits, buyer interviews, and competitive analysis across cybersecurity, B2B SaaS, healthcare services, and professional services — suggests a potential shift: visible authority signals may influence consideration before buyers actively evaluate solutions. In our exploratory audits and buyer interviews across cybersecurity, SaaS, healthcare, and professional services, some firms appeared as expert voices during early problem research.

> We call it the **first-mover authority advantage** — and it is decided upstream, where most marketing never looks.

KEY FINDINGS

Five signals of the shift.

92%
enter the process with a vendor already in consideration[1]

95%
of winners on Day One shortlists[2]

51%
start software research with AI more than Google[3]

95%
plan GenAI in a future buying activity[4]

94%
of surveyed B2B buyers used LLMs[5]

Taken together, these numbers describe a market where the decisive moment has moved upstream — into a research phase that happens inside AI tools, before a single sales touch.

Sources: Forrester (2025) · 6sense (2025) · G2 (2026). Full references on final page.

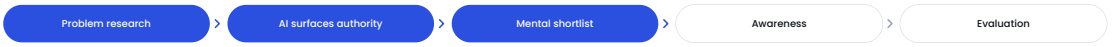
THE UPSTREAM SHIFT

Authority now precedes awareness.

Buyers no longer begin research by searching for vendor names. They begin by researching problems, frameworks, risk factors, and buying criteria. During this problem-awareness stage, AI systems surface firms with strong authority signals as expert sources, case studies, and quoted specialists.

The advantage is structural: high-authority firms become top-of-mind *before* buyers know they're evaluating vendors. By the time prospects ask "who can help me?", certain companies are already positioned as credible category leaders — while others remain completely unknown.

THE NEW SEQUENCE



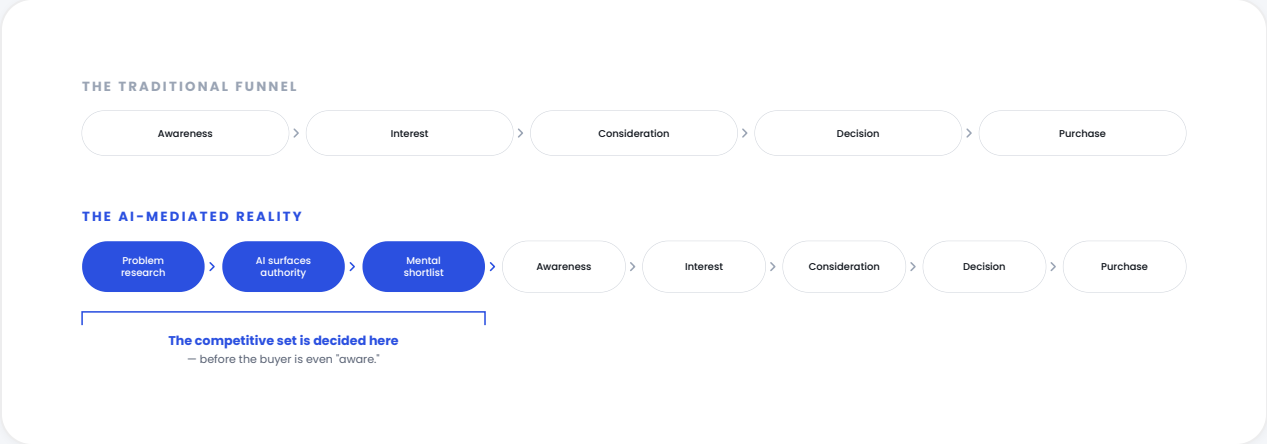
Problem research surfaces high-authority firms → a mental shortlist forms → the buyer becomes "aware" of those brands → formal evaluation begins with the list already pre-selected.

Vendors absent from the Day One shortlist face steep odds: 6sense found that only 5% of 2025 deals went to vendors added later.

THE NEW COMPETITIVE REALITY

The funnel didn't shrink — it reordered.

Traditional marketing assumes a linear funnel. In AI-mediated environments that model breaks: the competitive set is formed upstream, during problem research, and the "awareness" marketers optimize for now happens *after* the shortlist already exists.



Teams optimizing for the traditional model are entering the game after the most critical competitive decisions have already been made.

RESEARCH METHODOLOGY

A mixed-method study.

To test whether authority creates upstream advantage, we combined quantitative authority audits with qualitative buyer interviews across four verticals known for complex, considered purchases.

QUANTITATIVE · AUTHORITY SIGNALS

- ☐ Depth & freshness of topic-specific expert content
- ☐ Volume & authority of third-party citations and press
- ☐ Entity-data completeness across platforms (knowledge graph)
- ☐ Machine-parseable customer proof and social proof

QUALITATIVE · BUYER INTERVIEWS

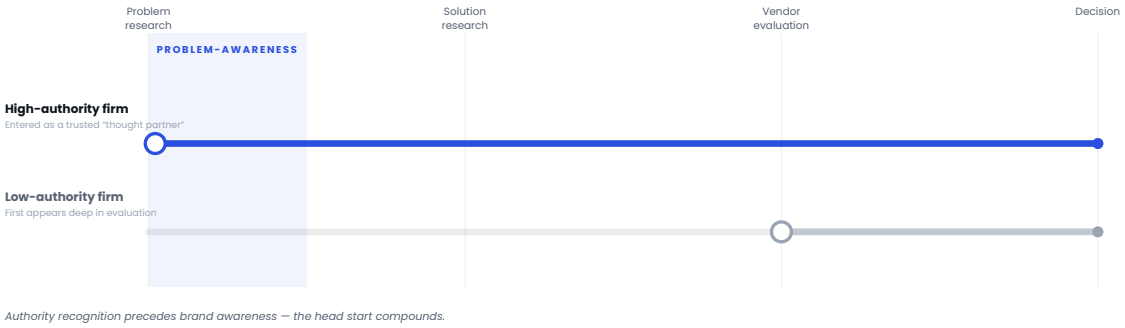
- ☐ Where buyers went first when starting research
- ☐ Which sources they trust to judge credibility
- ☐ How early specific vendors appeared on the shortlist
- ☐ Whether considered vendors were unknown at the start

Rather than asking buyers to speculate, we asked them to recount what actually happened — paying close attention when they mentioned conversational AI, AI-surfaced research reports, or hybrid search blending web snippets with synthetic answers.

TIMELINE MAPPING

When authority enters the picture.

For every vendor buyers mentioned, we mapped three moments: **authority recognition** (first viewed as a thought leader), **brand awareness** (noticed via ads or outreach), and **first engagement** (demo, question, action). If authority drives upstream advantage, recognition should precede awareness.



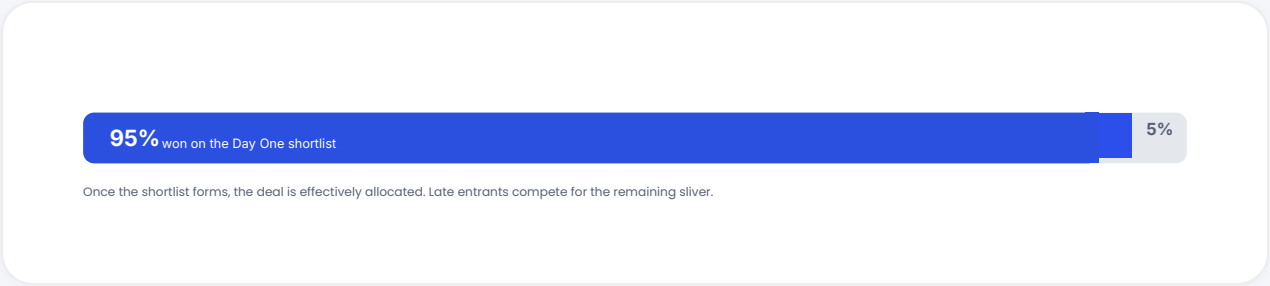
Authority recognition precedes brand awareness — the head start compounds.

It did. High-authority firms were treated as thought partners and placed on "listening lists" before any RFP — while low-authority firms rarely surfaced until deep into evaluation, and struggled to shift perception once finally in the room.

KEY FINDINGS · THE DAY-ONE SHORTLIST

The list is written on day one.

High-authority firms were consistently included in buyers' first shortlists — often without buyers recalling any prior exposure through traditional marketing channels. First-mover advantage has shifted upstream to the problem-awareness stage, before "top-of-funnel" activity even begins.



92%

of buyers enter with at least one vendor in consideration[6]; 41% already have a preferred vendor.[7]

5%

of deals are won by vendors added late[9] — the cost of arriving after the list is set.[8]

PATTERNS · 01–02

How firms get pre-selected.

01

Expert content creates invisible brand-building

Buyers begin with problem keywords, not brand names — and encounter high-authority firms inside AI-authored articles, guides, and expert quotes. Several decision-makers could recite a firm's perspective verbatim yet couldn't name the firm until shown. Helpful "expert content" only later resolves into "a real company that sells services."[10]

02

AI assistants pre-select category leaders

High-authority firms appeared far more often in answer boxes, explainers, and synthesized lists — surfaced as examples of what "good" looks like, as outcome case studies, and as the quoted experts defining category standards. AI made them the benchmark, and the benchmark is top-of-mind when buyers ask "who can help me?"

PATTERNS · 03–04

Why the gap compounds.

AI adoption is accelerating the shift

G2 found 51% of software buyers started research with AI chatbots more often than Google.[11] 6sense reported 94% of B2B buyers used LLMs.[12] Forrester found 95% planned generative AI use in a future purchase.[13] These studies show adoption, not AI-caused shortlisting.

Early consideration creates compound advantage

04

Buyers began considering high-authority firms while still defining the problem — treating them as thought partners on listening lists before any RFP. Lower-authority firms were rarely mentioned until deep in evaluation, and struggled to change perception even with paid reach or outside-category brand recognition.

These exploratory patterns appeared across the four verticals examined; they do not independently establish AI as the cause of purchasing decisions.

THE EXCEPTIONS

When low authority can still compete.

In rare cases — usually strong pre-existing brand awareness or a direct referral from a trusted advisor — low-authority firms were considered. Even then, the disadvantage showed:

- ☐ Buyers recalled questioning how well the option would actually fit their needs
- ☐ Those firms were discussed far less frequently in AI discovery modes
- ☐ Buyers sought outside validation before proceeding

> The exceptions prove the rule: absent extraordinary brand equity or personal relationships, **authority decides who competes.**

MARKET IMPLICATIONS

Authority is the new gatekeeper.

Firms now compete to be on the "day-one shortlist" the buyer and their AI assistant build before either considers traditional engagement. The strategic question is no longer rhetorical: brand authority has become the upstream competitive advantage.

FOR MARKETERS

You can't win the awareness game by building recognition alone — that comes after you're recognized as a contender.

- [ ] Craft expert content AI recognizes and cites
- [ ] Earn third-party mentions and media features
- [ ] Keep entity data consistent across the web
- [ ] Structure proof in machine-readable formats

FOR BUSINESS LEADERS

Treat authority as a strategic pillar equal to product, pricing, and distribution.

- [ ] Improve how you perform at first problem research
- [ ] Influence how early you're invited to compete
- [ ] Shape how you're positioned during RFPs
- [ ] Reduce pressure to compete on price

CONCLUSIONS

Authority is no longer optional.

Earlier research showed authority's impact during vendor comparison. This study proves there's an even earlier stage — before buyers know which vendors to compare — where authority determines who gets compared at all. Influencing authority signals isn't a nice-to-have; it's an upstream input that decides whether you're considered in the first place.

The first-mover authority advantage

- [ ] You appear in problem-research content as an expert voice
- [ ] AI positions you as a category benchmark and thought leader
- [ ] Buyers add you to mental shortlists before formal evaluation
- [ ] You enter sales conversations as a trusted advisor — not a vendor

Meanwhile, competitors without authority infrastructure stay invisible through the critical problem-awareness stage — forced to fight for consideration after perceptions have already set.

THE URGENCY IS CLEAR

The question isn't whether authority matters.

It's whether you'll build it before your competitors do.

Forrester found that 95% of B2B buyers planned to use generative AI in at least one aspect of a future purchase. G2 found that 51% of software buyers now start research with AI chatbots more often than Google. These surveys demonstrate growing AI adoption, but do not establish that AI alone determines shortlists or sales outcomes.

Authority Engine

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CITATIONS & SOURCES

The evidence base.

Published surveys are cited alongside original, unpublished Authority Engine observations.
Click a numbered source to open published research or jump to the methodology section.

01 Forrester (2025). Buyers' Journey Survey 2024: 92% had a shortlist; 41% a preferred vendor.

02 6sense (2025). B2B Buyer Experience Report: 95% of winners on Day One shortlist.

03 G2 (2026). The Answer Economy: 51% start AI-chatbot research before Google.

04 Forrester (2025). From Keywords to Context: 95% plan GenAI use in a future purchase.

05 6sense (2025). B2B Buyer Experience: 94% reported LLM usage.

06 Forrester (2025). Op. cit. — 92% entered with a vendor shortlist.

07 Forrester (2025). Op. cit. — 41% had a preferred vendor.

08 6sense (2025). Op. cit. — 95% of deal winners on Day One shortlist.

09 6sense (2025). Op. cit. — 5% went to vendors added later.

10 Authority Engine (2026). Unpublished interviews; methods outlined on p. 6.

11 G2 (2026). Op. cit. — AI chatbot use in software research.

12 6sense (2025). Op. cit. — LLM use by buyers.

13 Forrester (2025). Op. cit. — planned GenAI use.

14 Authority Engine (2026). Interpretive, unpublished analysis; methods on p. 6.

15 Forrester (2025). Op. cit. — future-purchase GenAI use.

16 G2 (2026). Op. cit. — 51% start with AI chatbots.

Research note: General shortlist statistics do not isolate AI as a causal factor in vendor selection.

Authority Engine

AI Authority Engineering — research, infrastructure & pipeline.

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