

# TALLY

STRATEGIC BUSINESS LAYER

## 01 INTRODUCTION

### What is Tally?

Tally is a minimalist, Notion-like form builder that allows SaaS founders to create **complex data capture flows in seconds**. It functions as the primary "Front-End" for Kaiten, ensuring that every user interaction — from beta requests to onboarding — is captured as structured, relational data from Day-1.

## 02 CORE BENEFITS

- INSTANT ITERATION** Deploy production-ready forms for lead generation or surveys with **zero engineering overhead**.
- RELATIONAL ACCURACY** Use native logic to translate form fields into structured "Company + Person" relationships.
- WEBHOOK-FIRST DNA** Native support for outbound events makes it the perfect "trigger" for your automation stack.

## 03 TECH DEEP DIVE

### The Front-Door: Structured Input

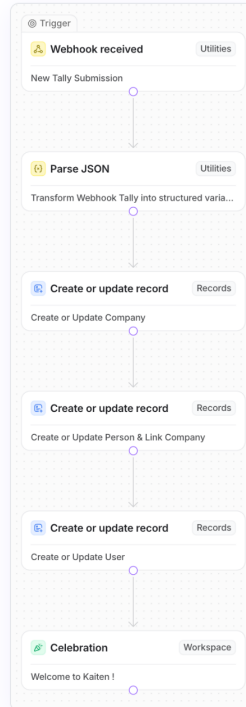
THE POWER OF OBJECTS

Capturing data is simple; capturing **actionable data** is the challenge. By using Tally as your primary input layer, you force data quality at the source. This prevents **Glue Code** debt by ensuring every lead enters your ecosystem with a valid structure before it ever reaches your infrastructure.

#### The Tally → Attio Automation Flow

How we turn a Tally submission into a structured Business State using Attio's native workflow engine:

- TRIGGER (WEBHOOK)** Attio receives the JSON payload (Email, Name, Company) from Tally.
- PARSE JSON** This essential step transforms the raw webhook data into structured variables (Email, Name, Company), making them usable for downstream blocks.
- UPSERT COMPANY** The "Create or Update Record" block matches the Company by Name. If new, it creates a unique Record ID to anchor the business entity.
- UPSERT PERSON & LINK** Creates or updates the Person via Email and dynamically maps them to the Record ID from Step 3.
- UPSERT USER** Finalizes the identity state by creating or updating the User record, ensuring the workspace access matches the contractual reality.



## 04 MARKET LANDSCAPE

### Key Competitors

PLATFORM	CHARACTERISTICS
tally* Tally	Agile Founders, Best UX, Free to Start
Typeform	Enterprise Marketing, High Cost, Rigid Logic
Fillout	Advanced Forms, Multi-page, Direct Database