

Sample report · AI Visibility Audit

AI Visibility Audit: Tally

Independent public-sources demonstration. Not commissioned or endorsed by the companies analysed. Tally did not commission, review or approve this analysis.

Agent readiness (official)

1/5

Basic Web Presence — Cloudflare, 2026-07-25

Brand recognised

45/45

Answered questions, all platforms

Recommended

39/45

Of answered questions

Competitors observed

4

Incl. 1 unexpected entrant

Factual issues flagged

3

2 overstated claims, 1 cross-platform proxy

Sources visible

24

Perplexity's captured run

Top recommended action: publish an evidence-first buyer page answering the 18 tested questions with dated claims.

Executive summary

Tally is strongly *recognised* by all three platforms: it was mentioned in every answered question. Recognition did not translate into consistent *recommendation*: preference depended on the buyer need, and specific competitors owned specific use cases — Fillout for database-centric workflows, Jotform for complex calculations and approvals, Typeform for polished customer-facing UX.

Three findings matter most. First, Perplexity's answer ended after 9 of 18 questions, so half the buyer questions were never answered there. Second, Gemini made two claims stronger than the vendor's own published facts (“encrypted end-to-end”, “GDPR compliant by default”). Third, third-party listicles and competitor pages shaped answers more visibly than Tally's own buyer-facing evidence.

Technically, the official Cloudflare Agent Readiness scan places the site at level 1/5 (Basic Web Presence): crawlable and discoverable at the basics, with the newer agent-facing standards not yet adopted. The recommendations in section 11 target the visibility and evidence gaps, which are independent of that technical result.

SECTION 02

Technical agent readiness (official)

Level 1/5 — Basic Web Presence

Score source: [Cloudflare Agent Readiness](#) · scanned 2026-07-25 · preset: Content Site

Discoverability

2/4

robots.txt and sitemap pass; Link headers and DNS-AID records missing.

Content Accessibility

0/1

No Markdown content negotiation for agents.

Bot Access Control

1/2

AI bots allowed via wildcard rules; no Content Signals declared.

API, Auth, MCP & A2A Discovery

n/a

Not applicable under the Content Site preset.

Commerce

n/a

Not applicable under the Content Site preset.

Cloudflare is the source of the technical Agent Readiness result. This audit is an independent service and is not affiliated with or endorsed by Cloudflare. Agent readiness measures whether automated agents can discover, read and interact with a website — it does not show whether AI assistants recommend the brand, which is what the rest of this report tests.

SECTION 03

Website observations (unscored)

- **Entity naming — needs attention:** platforms and pages alternate between “Tally” and “Tally.so”, weakening entity consistency.
- **Trust signals — needs attention:** the sampled public pages expose few visible identity, authorship and policy signals.
- **Structured data — partial:** Organization and product-type JSON-LD present on sampled pages; no FAQ schema on answer content.
- **Citation surface — passed:** concrete, quotable pricing and feature claims, with external references present.

These are our own bounded-scan observations (four public pages, 2026-07-25). They are reported without a score and are independent of the official Cloudflare result above.

SECTION 04

Platforms tested

ChatGPT, Gemini and Perplexity, using the publicly accessible guest/default experience on 2026-07-23. One combined prompt asked each platform to answer the same 18 buyer questions separately, rank a shortlist, and explain trade-offs, followed by human fact checking. No vendor was described as a client. Paid, logged-in or personalised modes may answer differently; see section 13.

SECTION 05

Prompt categories

The 18 questions covered ten buyer-intent categories. A customer audit derives its prompt set the same way — from the customer's five seed questions, expanded to 15–20 prompts.

Category	Prompts	Example
Category discovery	2	What are the best online form builders for a small B2B SaaS company?
Alternatives	2	What are the best simpler alternatives to Typeform?
Feature fit	4	Which form builders support conditional logic, payments and webhooks without a large engineering project?
Privacy & region	2	Which form builder has the clearest European data-hosting position?
Direct comparison	1	Compare Tally, Typeform, Jotform and Fillout for this use case.
Budget	1	Which form builder is best for unlimited forms and responses on a low budget?
Use-case fit	3	Which form builder is best for customer onboarding?
Integrations	1	Which form builder works well with Notion and Airtable?
Ease of use	1	Which form builder is easiest for a non-technical marketing team?

Category	Prompts	Example
Entity & verification	3	What is Tally, who is it for, and what is its main differentiation?

SECTION 06

Brand-recognition findings

Every platform recognised the brand in every question it answered: ChatGPT 18/18, Gemini 18/18, Perplexity 9/9 answered (50% prompt coverage — its response ended after question 9). Recognition included the correct category, core features and European positioning.

SECTION 07

Recommendation findings

Platform	Answer coverage	Recommendation visibility	Where it was not preferred
ChatGPT	18/18	Recommended in 14/18	Workflow-depth questions (databases, approvals)
Gemini	18/18	Recommended in 17/18	Complex approval workflows
Perplexity	9/18 before the answer ended	Recommended in 8/9 answered	Operational onboarding

Recommendation strength tracked the buyer need, not overall brand strength: the platforms recommend whoever owns the evidence for that specific use case.

SECTION 08

Competitor visibility

Competitor	Owned frame	Where observed
Fillout	Two-way CRM/database workflows	Ahead on all three platforms
Jotform	Complex calculations and approvals	Ahead on all three platforms
Typeform	Polished customer-facing UX	Consistently associated
FormVault (unexpected)	Privacy-focused alternative	Introduced by Perplexity unprompted

Unrequested competitors appearing in answers is exactly what an audit is designed to surface.

SECTION 09

Source and citation observations

ChatGPT

Visible labels included Tally, Fillout and TechRadar. Tally's own pages supported feature claims, while comparison claims were less consistently sourced.

Gemini

No citations were shown in the guest/default answer, despite several specific hosting and corporate-jurisdiction claims.

Perplexity

Twenty-four sources reported in the captured run. Visible links included official Tally, Fillout, Jotform and Typeform pages, plus useCarly, FormVault and comparison publishers.

Visible Perplexity links

- tally.so/pricing
- fillout.com/pricing
- jotform.com/pricing/
- typeform.com/pricing/
- formvault.eu

SECTION 10

Factual accuracy

Gemini: “encrypted end-to-end” overstates Tally's published security claim. Tally states that data is encrypted in transit and at rest; that is not the same as end-to-end encryption.

Gemini: “GDPR compliant by default” was presented as a blanket conclusion. A vendor can provide GDPR-oriented controls, hosting and contracts, but the customer's configuration and processing purpose still matter.

Cross-platform: several answers used “EU-hosted” as a proxy for privacy suitability without consistently checking subprocessors, data-residency scope, retention settings or plan-specific controls.

Tally's official documentation does support the narrower facts that it is based in Belgium, stores form data in Europe, offers a DPA, and provides conditional logic, Stripe payments and webhooks.

SECTION 11

Five prioritised recommendations

1. 1

Publish an evidence-first buyer page

Answer the 18 tested questions directly with concise, dated claims and links to the relevant official documentation.

2. 2

Separate privacy facts from legal conclusions

State company location, storage region, DPA availability and optional subprocessors independently; explicitly avoid claims about legal immunity.

3. 3

Strengthen the workflow feature evidence

Create one practical example showing conditional logic, Stripe payments and signed/retried webhooks working together for a lead or onboarding flow.

4. 4

Create a maintained comparison evidence pack

Use factual tables for Tally vs Typeform, Fillout and Jotform, with plan/date caveats and no unsupported superiority claims.

5. 5

Improve entity consistency and independent references

Use the same product name across titles and structured data, then earn citations from credible independent software and privacy publications.

SECTION 12

Next-step roadmap

1. **Weeks 1–2 — quick fixes.** Entity-naming consistency, trust signals, and the highest-priority evidence page from the recommendations.
2. **Optional — Action Plan (€299).** The findings expanded into an exact page, content, entity, schema, authority and measurement backlog. €49 credited if ordered within 7 days of the audit.
3. **Optional — Implementation Sprint (from €900, scoped separately).** We implement the priority fixes on the website and supporting content.
4. **Retest.** Re-run the same prompt set against the same platforms and compare against this dated baseline.

SECTION 13

Methodological limitations

- One test run per platform on 2026-07-23; outputs can change without notice.
- Guest/default experiences may differ from paid, logged-in or personalized modes.
- The combined prompt may create context effects between the 18 questions.
- Perplexity returned only questions 1–9 before ending; coverage is shown explicitly.
- Only citations visible in the captured interface were recorded.
- The official Agent Readiness result reflects Cloudflare's scanner on its scan date; the scanner and its checks evolve.
- Our website observations sample at most four public HTML pages; they are bounded and unscored.
- This is not legal advice and not an exhaustive technical audit.
- No ranking, citation, inclusion or traffic outcome is guaranteed.

Want the same documented audit for your company?

15–20 customer-intent prompts, three AI platforms, human QA, source and error checks, and five prioritised actions. €49, delivered within 3 business days.

[Get the AI Visibility Audit — €49](#)

AI AUDIT

Independent AI systems practice

See whether ChatGPT, Gemini and Perplexity recommend your brand.

Sold under the product label AI Workflow Products.

Get found by AI

- [Free Readiness Check](#)
- [AI Visibility Audit — €49](#)
- [Action Plan](#)
- [Sample report](#)
- [Methodology](#)

Build with AI

- [Opportunity Kit](#)
- [Design Toolkit](#)
- [Workflow Blueprint](#)
- [Sample Blueprint](#)
- [FAQ](#)

Legal

- [Terms](#)
- [Privacy](#)
- [Refund & Delivery](#)
- [Support](#)

© 2026 AI Workflow Products. Independent AI systems practice.

“AI Workflow Products” is a descriptive label for the products sold here, not a registered trade name. Seller details are on the [Terms](#) page.