

Typeform & Tally for Smart Forms — Workbook

This workbook turns the course into a set of forms you can actually ship: a tool-choice decision, a branded conversational form, a branching logic map, a scored quiz or lead grade, a website embed, and an integration that routes every response into your stack. Work through one section per module, building in both Typeform and Tally as you go and filling each worksheet with your real project. By the end you will have a working form, an automated follow-up flow, and a completion-rate checklist you can reuse for every future form.

Choosing Your Tool and Building Your First Form

Decide between Typeform and Tally for your project, then build a complete conversational form with the right field types.

Worksheet: Tool Selection Decision Sheet

Fill this in for one real form you need to build. Weigh cost, branding, volume, and polish, then commit to Typeform or Tally with a one-line reason. Revisit it whenever you start a new form.

What the form is for (survey, lead capture, quiz, payment, intake)

Is it client-facing or brand-critical? (yes or no)

Expected monthly response volume

Budget per month (free, up to 30 USD, more)

Do you need third-party branding removed? (yes or no)

Chosen tool and the one-line reason

Exercise: Build the Same Form in Both Tools

Recreate one three-question form in Typeform and in Tally so you feel both editors. Use a welcome screen, three questions, and an ending or thank-you page, then preview each as a respondent on desktop and mobile.

- List your three questions and the field type for each (for example Short Text for name, Email, Multiple Choice for need).

- Write the welcome screen line with a time estimate, for example: This takes about 90 seconds.

- Write the ending or thank-you message and the next step (redirect, calendar link, or confirmation).

Worksheet: Field Type Picker

For each question you plan to ask, choose the field type that gives clean, analyzable data. Prefer closed types when you will count or branch on the answer and open types only when the wording is the value.

Question 1 wording and chosen field type

Question 2 wording and chosen field type

Question 3 wording and chosen field type

Which fields are required versus optional and why

Which fields use built-in validation (Email, Number, Phone, Date)

Checklist: First-Form Launch Checklist

- Form and every field named clearly for later use in logic and integrations
- Only questions you will actually use are included; nothing extra
- Welcome screen sets a time expectation; ending screen sets a next step
- Required versus optional set deliberately to limit abandonment
- Previewed as a respondent on both desktop and mobile before sharing

Logic, Branching, and Personalization

Add branching logic, personalize with recall and hidden fields, and build a scored quiz or lead grade.

Worksheet: Branching Logic Map

Map your form's branches on paper before building. List the deciding question, each answer, where it routes, and the ending it reaches. Branch only on single-select questions and always include a default path.

Deciding question and its answer options

Answer A !' which question or section it jumps to

Answer B !' which question or section it jumps to

Default path for any unexpected answer

Which ending screen each path reaches

Exercise: Add Recall and Hidden Fields

Personalize your form by recalling an earlier answer and passing data in through the URL. Add a first-name question, recall it later, then define hidden fields and build a link that fills them.

- Write the later question that recalls the name, for example: Thanks (name), which option fits you best?
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- List the hidden fields you will capture (for example name, email, utm_source).
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- Write one example link that passes them, such as ?
name=Maria&email=maria@acme.com&utm_source=newsletter.

Worksheet: Quiz or Lead-Grade Scoring Rubric

Write your scoring rubric before you build it. List each answer, the points it earns, the result bands, and what each band means. Test the all-low and all-high extremes once built.

Variable or calculated field name (for example score)

Each answer and the points it adds

Result bands (for example 0 to 7, 8 to 14, 15 plus)

What each band shows or routes to (ending screen or page)

For a knowledge quiz: the correct option on every question

Checklist: Logic and Scoring QA

- Every branch sketched on paper before building
- Branching uses single-select questions; a default path exists
- Recall fields have a fallback so a greeting never reads blank
- Hidden field values are URL-encoded and a utm field captures source
- Scoring extremes tested: all-low and all-high results display correctly

Branding, Embedding, and Taking Payments

Brand the form, embed it on your site with the right placement, and add Stripe payments and file uploads.

Worksheet: Brand Theme Specification

Record your exact brand settings so every future form starts consistent. Save one form as your reusable theme or starter, and decide whether removing the third-party badge is worth a paid plan for this project.

Primary brand color (hex)

Font name

Logo file and background choice

Remove third-party badge? (Typeform paid plan or Tally Pro)

Custom domain for forms (for example forms.yourbrand.com)

Exercise: Embed the Form on a Page

Choose an embed type that matches the form's job, generate the snippet, and paste it into your site builder. Test the live page on desktop and mobile and confirm the form loads, submits, and redirects correctly.

- Which embed type fits this form and why (inline, popup, slider, popover, or full page)?
- Which page and site builder will host it (WordPress, Webflow, Squarespace, Wix)?
- How will UTM data pass through the embed into hidden fields for attribution?

Worksheet: Payment and Upload Setup

Plan a form that takes money or files. Define the amount logic, where the payment step sits, and what files you accept, then test the paid flow in Stripe test mode before going live.

What is being paid for and the amount or amount logic

Currency and whether the price is fixed or calculated

Where the payment step sits in the flow (after name and email)

File upload: accepted formats and size limit (for example PDF, under 10 MB)

Where uploaded files should be routed (cloud storage folder)

Checklist: Branding, Embed, and Payment Check

- Brand colors, font, logo, and background applied and saved as a theme
- Third-party badge removed for client work if required
- Embed type matches the goal; container has enough height
- UTM data passes through the embed URL into hidden fields
- Stripe flow tested in test mode, then one small real charge verified
- Price, currency, and what the buyer gets stated clearly before payment

Integrations, Automation, and Optimization

Route responses into your tools, automate follow-up with Zapier or Make, and lift completion rate with analytics.

Worksheet: Integration Routing Plan

Decide where each response should go and how fields map. Cover your spreadsheet log, CRM, and team notification at minimum, and note whether to create or update records.

Destinations (Google Sheets, CRM, Slack, email, Notion or Airtable)

Field mapping (which form field maps to which column or property)

Create new record or update existing (matched on email)?

Hidden fields to carry through (utm_source, CRM record ID)

Webhook target if no native integration exists (Zapier or Make catch hook)

Exercise: Build a Follow-Up Automation

Create a Zapier Zap or Make scenario triggered by a new form entry, then chain the steps that should run automatically. Test with one real submission and confirm every downstream step fired.

- List the trigger and steps in order (create CRM contact, append Sheets row, send email, post to Slack).
- What filter or router condition limits a step (for example only email leads scoring above a threshold)?

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- How will you catch failures (error notifications) and watch task or operation usage?
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Worksheet: Completion-Rate Tracker

Record your form's key numbers from the analytics view, find the highest drop-off question, form one hypothesis, and plan a single change. Re-check after the change to see if completion rose.
Completion rate (finishes divided by starts)

Question with the highest drop-off

View-to-start rate and average completion time

One hypothesis for the drop-off

The single change to test next and the date to re-check

Checklist: Integration and Optimization Guardrails

- A test response confirmed to land correctly in every destination
- A filter blocks test and spam entries from creating junk records
- Task or operation usage monitored so volume does not break the plan quietly
- Error notifications on so failed steps do not lose leads silently
- Completion rate, drop-off, and view-to-start reviewed in analytics
- Only one form change tested at a time so you can read what worked

Your Action Plan

1. Complete the Tool Selection Decision Sheet and commit to Typeform or Tally for your first form
2. Build the same three-question conversational form in both tools with a welcome and ending screen
3. Pick the right field type for every question and set required versus optional deliberately
4. Map your branching on paper, then build Logic Jumps or Tally conditional logic and test every path
5. Add recall and hidden fields, and build a scored quiz or lead grade with a written rubric and tested extremes
6. Apply your brand theme, remove the third-party badge for client work, and save the theme for reuse
7. Embed the form on a page with the right placement and test it on desktop and mobile
8. If needed, add a Stripe payment field and a file upload, and test the paid flow in Stripe test mode
9. Connect native integrations to Google Sheets, your CRM, and Slack, mapping fields and testing a submission
10. Build a Zapier or Make follow-up flow, then track completion rate and test one change to lift it

