THE STALL POINT DIAGNOSTIC

Where Tallyworth's deals stall, and what to change first

Diagnostic report, recommendations and implementation plan

SAMPLE. TALLYWORTH IS A FICTIONAL COMPANY

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Engagement length: four weeks
Format: report, Notion implementation plan, video walkthrough, follow-up call

BEFORE YOU READ

What a Stall Point Diagnostic gives you

The report you're reading is one part of four. It explains what's happening. The other parts are there so your team can act on it without a big project or a new tool. This report is here to help your team put the right changes in place quickly, without eating into their working week.

01

The diagnostic report

Where your deals stall, with every finding backed by buyer interviews and your own data, and a ranked list of fixes with the time each one takes and who owns it.

02

A step-by-step implementation plan

A Notion plan you duplicate into your own workspace. Phases, checkboxes, owners and time estimates, with a plain how-to note beside each step.

03

A video walkthrough from me

A recorded walkthrough of the findings and the plan. Share it with your team so nobody needs a meeting to get up to speed.

04

A follow-up call

Book it any time in the three months after delivery, to review what's been done and adjust the plan.

Built for a lean team. Every fix uses tools Tallyworth already uses every day, such as HubSpot and Google Docs. Month one asks for about 13 hours across the team, spread over four weeks. After that it's a 20-minute monthly review.

THE SHORT VERSION

Tallyworth's stall point

Tallyworth sells accounts payable automation to UK firms with 50 to 500 staff. It's founder-led, with £1.8M in annual recurring revenue and a team of nine. Demos go well and proposals get warm replies and then most deals go quiet.

> Deals stall when the finance director needs a payback case and a safe switchover plan. Instead they hear a product demo.

What we found

46%
of stalled deals went quiet within ten days of the demo. This was after the contact said they'd take it to their finance director.

9 of 24
stalled threads end on the same unanswered question about keeping current approvals running during the switch.

0
pages of the proposal are written for the finance director, who signs every deal.

11
deals had no contact after day 14. These buyers usually take three to six weeks to decide.

What to do first

Give your prospect a one-page summary written for their finance director and add a switchover plan to the proposal. Both take under a day between them and target where most deals are lost.

THE EVIDENCE

Where the 24 stalled deals stopped

We worked through every deal that stalled in the last nine months. We analysed email threads, CRM notes, call notes, and the proposals that were sent. Each deal is placed at the last stage where the buyer was still replying.

Reading this chart. The demo itself goes well. In 9 of the 11 deals that stopped there, the contact's last message suggests they were positive. The deal stalls in the conversation that happens after the demo, between your contact and their finance director, which Tallyworth is never part of.

What we reviewed

Source	Volume	Used for
Stalled deal threads and CRM notes	24 deals	Finding where and why each deal stopped
Won deals from the same period	6 deals	Seeing what was different when deals closed
Proposals sent	14	Checking what the finance director actually received
Website, pricing page and demo deck	9 pages	Checking what buyers see before and after a call
Interviews with buyers who held off	4 calls	Hearing why they stopped, in their own words
Interviews with recent customers	2 calls	Hearing what tipped them into signing

THE EVIDENCE

Four findings

Every finding is tagged by how we know it. SAID means buyers told us directly. SEEN means their behaviour shows it. Each finding rests on at least two sources, and nothing here relies on a guess alone.

1. The demo is pitched at the person who doesn't sign

SAID SEEN

Demos are built for the accounts payable manager who loves the product. The finance director, Sarah, is the one who signs. She hears about Tallyworth second-hand.

> *"Looks great, I'll run it past Sarah and come back to you." Contact, deal 7*

> *"Sarah's asked what the payback looks like before she'll look at it." Contact, deal 15*

2. The question nobody answered

SAID SEEN

In 9 threads the last real question was about keeping current approvals running during the switch. The proposal has no section on it. The reply was a link to a help article.

> *"What happens to our approval chain while we move over? We can't have invoices stuck." Finance director, deal 19*

> *"Nobody could tell me how our approvals would keep running during the move, so it went on the back burner." Lost buyer, interview*

3. The pricing page sends finance directors away early

SAID SEEN

The pricing page says "contact us". Three finance directors asked for a price by email before agreeing to a demo, and two never replied after receiving a 14-page PDF.

4. Follow-up stops before the buyer has decided

SEEN SAID

Won deals took a median of five weeks from demo to signature. Follow-up on stalled deals stopped after two emails, at around day 14. Four of those deals later came back on their own and signed. Two of the buyers we interviewed said they were still deciding when the emails stopped.

RECOMMENDATIONS

The fix list, in order

Ranked by how many stalled deals each fix would have reached, then by effort. Nothing here needs a new tool or a new hire.

#	Fix	Reaches	Time	Owner	When
1	One-page summary for the finance director that champions can forward	11 deals	4 hrs	Founder	Week 1
2	Switchover plan section in the proposal template	9 deals	3 hrs	Founder and ops lead	Week 1
3	Rewrite the post-demo follow-up email (written out on page 7)	11 deals	1 hr	Account executive	Week 2
4	Extend follow-up to six weeks, with a reason to write each time	11 deals	2 hrs	Account executive	Week 2
5	Publish a starting price and a payback example on the pricing page	3 deals	2 hrs	Marketing exec	Week 3
6	Add a "stall reason" field to HubSpot deals	All future	1 hr	Account executive	Week 3

Total: about 13 hours across four people in month one. The biggest single job is the finance director summary, and the plan includes a template for it so it isn't written from a blank page.

What we'd leave alone

The demo itself and the paid search campaigns are doing their job. Changing them now would use time without reaching the stall.

TWEAKS AND FIXES

The post-demo email, before and after

Every recommendation in the plan comes with a worked example or template like this one, so the person who owns it can use it the same day.

BEFORE

Hi Tom,

Great to speak today! As discussed, Tallyworth automates invoice capture and approvals with real-time dashboards for your whole AP team.

I've attached our product overview. Let me know if you have any questions, and I look forward to hearing from you.

AFTER

Hi Tom,

Thanks for today. You mentioned Sarah will want to see the numbers before anything moves, so I've attached a one-page summary written for her.

It shows when Tallyworth pays for itself based on the 1,400 invoices a month you mentioned, and how your current approvals keep running during the switchover.

If it would help, I'm happy to join a 15-minute call with Sarah so you're not fielding her questions on your own.

Why it works

The first email is written for Tom, who is already convinced. The second is written so Tom can forward it, and it answers the two questions Sarah asked in deals 15 and 19. It also offers a way into the conversation Tallyworth was missing.

IMPLEMENTATION PLAN PREVIEW

Your plan in Notion

This is how the plan looks once it's in your Notion workspace. Tick items off as you go and add notes for the follow-up call.

Phase 1: Give your champion something to forward

Week 1

☐ Duplicate the finance director summary template into Google Docs	Founder	15 min
☐ Fill in your payback figures using the calculator tab	Founder	2 hrs
☐ Send it to the contacts on your four open deals	Account exec	30 min

How to: start from the template, not a blank page. Replace the example figures with your own, keep it to one side of A4, and write it as if Sarah will read it on her phone between meetings.

Phase 2: Answer the switchover question

Week 1

☐ Write the switchover section using the outline in the plan	Ops lead	2 hrs
☐ Add it to the proposal template as page 2	Founder	1 hr

How to: describe the first 30 days in plain steps, including who does what on your side and theirs. Say what happens to invoices already in the approval chain. That one line answers the question from deal 19.

Phase 3: Fix the follow-up

Week 2

☐ Replace the post-demo email with the new version on page 7	Account exec	30 min
☐ Set up the six-week follow-up sequence in HubSpot	Account exec	2 hrs

How to: each follow-up gives the buyer something new, such as a short case study from a firm their size or an answer to a question from another buyer. Never send a "checking in" email with nothing in it.

IMPLEMENTATION PLAN PREVIEW

Phase 4: Price and tracking

Weeks 3 and 4

☐ Publish a starting price and one payback example on the pricing page	Marketing exec	2 hrs
☐ Add the "stall reason" dropdown to HubSpot deals	Account exec	1 hr

Phase 5: Keep it going

Months 2 and 3

☐ Monthly 20-minute review of stall reasons, using the checklist in the plan	Founder	20 min
☐ Book your follow-up call with Monica	Founder	5 min

What changes for each person

The plan includes a short note for each role so the founder isn't the only one carrying it.

Role	What changes	Time in month one
Founder	Writes the finance director summary once, then reviews stall reasons monthly	about 5 hrs
Account executive	Uses the new follow-up email and sequence, and logs a stall reason on every lost deal	about 4 hrs
Ops lead	Writes the switchover section of the proposal once	about 2 hrs
Marketing exec	Updates the pricing page with a starting price and payback example	about 2 hrs

> **No new software and no retraining.** Everything lives in HubSpot and Google Docs, which the team already uses every day.

HOW THE FOUR WEEKS RUN

From first call to follow-up

01 **Intro call.** We talk through your situation, and I tell you plainly whether the Diagnostic is the right fit.

02 **Access and review.** You share your recent deal threads and proposals, and I work through them remotely. I also interview a few buyers who held off and a couple who signed, so the findings rest on what buyers actually said.

03 **Report and plan.** You receive the diagnostic report and your Notion implementation plan, ready to duplicate into your workspace.

04 **Video walkthrough.** I record a walkthrough of the findings and the plan. Share it with your team and they're up to speed without a meeting.

05 **Follow-up call.** Book it any time in the three months after delivery. We review what's been done and adjust the plan.

THIS WAS A SAMPLE

Curious where your own deals stall?

The Stall Point Diagnostic is £2,500 and runs over four weeks. If you'd like to talk it through, you can book a short intro call at palteq.co.uk/the-palteq-framework.

If you'd rather start on your own, the free Almost-Buyer Post-Mortem takes about an evening.