

TORK

Marketing Team Playbook

How to explain Tork, qualify the customer, run a clean demo and keep the story simple.

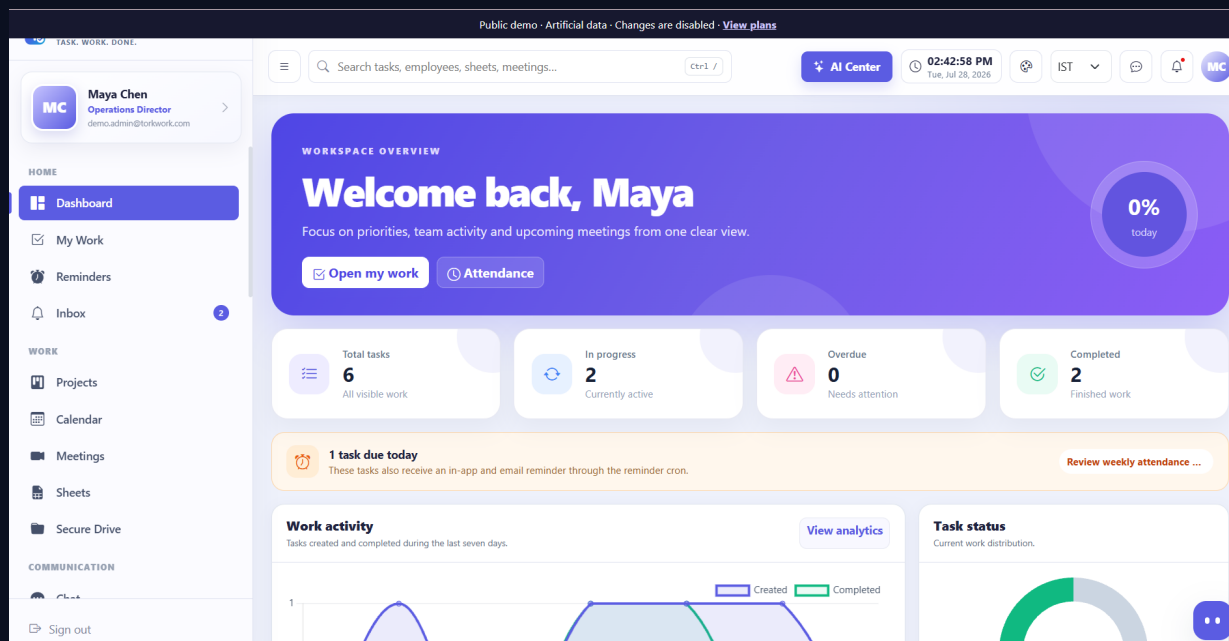
CUSTOMERS

PROJECTS

PEOPLE

SUPPORT

FINANCE



INTERNAL GUIDE • AUGUST 2026

What Tork is - and what it is not.

Lead with the operating workflow, not a list of modules.

TORK IS One operating workspace connecting customers, delivery, people, support, collaboration and finance.	TORK IS NOT A traditional CRM pipeline, a payroll-only product or a loose collection of disconnected tools.
THE PROMISE One understandable workflow for employees, managers and owners, with precise permissions underneath.	THE SENTENCE “Tork turns the work your company already does into one visible operating rhythm.”

Sell where operational handoffs are painful.

Best fit: companies with customer work, employees, approvals and repeated coordination.

IT & CLOUD SERVICES Projects, support, attendance and client delivery.	PROFESSIONAL SERVICES Customers, projects, meetings and invoices.
MULTI-COUNTRY OPERATIONS Employees, legal entities and country-aware payroll.	PROPERTY / FIELD TEAMS Attendance, tickets, Drive and Sheets.
FINANCE & BACK OFFICE Invoices, expenses and payroll approvals.	CUSTOM OPERATIONS Claims, compliance, approvals and tailored boards.

Three loops explain almost the whole product.

Use these before showing individual screens.

CUSTOMER & DELIVERY



PEOPLE & PAY



SUPPORT



Explain Tork in five sections.

The sidebar is intentionally understandable.

WORK Customers • Projects • Tasks • Support Tickets
PEOPLE Employees • Attendance • Leave
COLLABORATION Chats • AI Assistant • Meetings • Drive • Sheets
FINANCE Payroll • Invoices • Expenses
CONTROL Reports • Audit • Access Management • Settings

Show outcomes, not feature menus.

Use one connected example and move through the work.

SHEETS

Project Action Tracker

3 items · 4 columns · Updated 06 Aug 2026, 03:46 PM

Main table

My items

+ New item

Add column

Search

Person

Filter

Sort

Group by Status

Hide

	#	Action Item	Owner	Status	Due Date
Not started 1 item					
☐	1	hh	Layla Khan		dd-mm-yyyy
+ Add item					
Working on it 2 items					
☐	2	Confirm customer requirements	14		12-08-2026
☐	3	demo	Layla Khan	Working on it	06-08-2026
+ Add item					

Explain the live workboard: owners, statuses, dates, progress, long text, grouping and Excel-style column resizing.

SUPPORT

Report a problem, assign the right person, communicate, resolve it, and confirm closure.

1 New → 2 Assigned → 3 In Progress → 4 Waiting for Requester → 5 Resolved → 6 Closed

1 New tickets

0 Assigned to me

1 In progress

0 Waiting for requester

2 Response overdue

Search

Status

Priority

Category

Ticket, title, requester...

All statuses

All priorities

All categories

☐ Mine

Filter

Reset

Tickets

3 visible tickets

TKT-2026-AE01 · Customer cannot access shared folder

Confirm access and permissions for the customer project folder.

REQUESTER

Maya Chen

CUSTOMER / PROJECT

Gulf Horizon Trading

Gulf Horizon Support Portal

ASSIGNED TO

Layla Khan

PRIORITY

NORMAL

RESPONSE TARGET

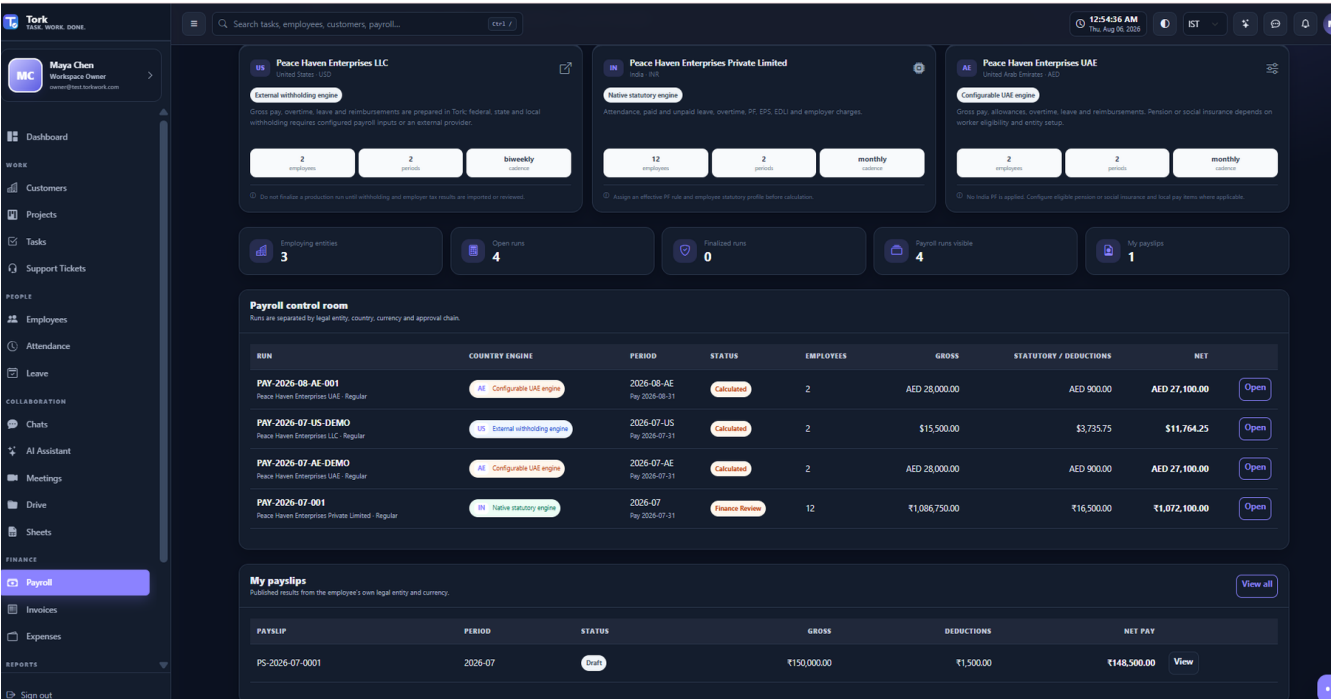
Overdue by 1 hour 51 min

Something went wrong. Reference: EB0A47B1

Explain ticket ownership from creation through assignment, replies, SLA, resolution and closure.

Country first. Entity first. Currency first.

Do not present payroll as one universal tax engine.



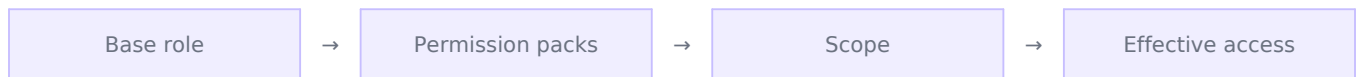
UNITED STATES • USD External withholding boundary. Gross, overtime, leave and reimbursements can be prepared; statutory withholding requires configured inputs or an external provider.
INDIA • INR Native PF / EPS / EDLI and configured statutory profiles.
UAE • AED Configurable allowances, deductions and eligibility-based pension or social insurance items.

Marketing rule: never promise automatic statutory coverage that has not been configured or externally integrated.

Make permissions feel simple before showing detail.

Normal assignment should not require understanding hundreds of permission rows.

The interface features a top navigation bar with tabs: Overview, Base roles, Permission packs, Access templates, and Advanced permissions. A prominent purple banner at the top reads "Clear access without role overload" with a subtext: "Use templates for routine assignments. Open detailed permissions only for exceptional requirements." Below this, three main sections are visible: "Base roles" (Responsibility level: Owner, Administrator, Manager, Employee or Auditor), "Permission packs" (Business areas such as HR, Finance, Payroll, Projects, Sales and Support), and "Access templates" (Reusable combinations of one base role, selected packs and a default scope). The "Recommended assignment flow" section outlines four steps: 1. Choose an access template (Example: Project Manager or Support Agent), 2. Confirm the base role (The person's general responsibility level), 3. Review business packs (Add only the modules required), and 4. Preview effective access (Verify menus, data scope and sensitive actions before saving). To the right, a "Safety rules" section lists rules like "System base roles" (Protected), "Default packs" (Duplicate to customize), "Custom records" (Archive or delete), "Assigned users" (Replacement required), and "Every change" (Audited).



- Five base roles: Owner, Administrator, Manager, Employee, Auditor.
- Optional packs: HR, Finance, Payroll, Projects, Sales and Support.
- Access templates save common combinations.
- Advanced permissions are for exceptions, not normal setup.

How to answer common comparisons.

“We already have a CRM.” Good. Tork does not have to replace the sales CRM. It can become the operating layer after customer work becomes real.	“We use Excel / Monday.” Tork Sheets gives a familiar workboard inside the same system as employees, support, projects, files and finance.
“Payroll is different everywhere.” Exactly why Tork separates runs by legal entity, country, currency and engine.	“Permissions look complicated.” Normal setup is one base role + permission packs + scope. Advanced permissions stay out of the way unless needed.

Tell one story. Do not jump randomly between modules.

1. DASHBOARD Show role-specific priorities.	2. CUSTOMER → PROJECT Explain the simple handoff.
3. SHEETS Show operational flexibility.	4. SUPPORT Show ownership and closure.
5. ATTENDANCE Show employee self-service.	6. PAYROLL Choose one country and explain isolation.
7. ACCESS Show role + packs + scope.	8. MOBILE / AI Close with the future-ready experience.

Five questions before the demo.

- How does customer work become assigned delivery today?
- How do you know who is working and what moved today?
- Where do support requests, internal requests or approvals live?
- Which countries and legal entities do you run payroll for?
- Who should see Finance, HR, Payroll, Projects or Support - and who should not?

Market confidently without overclaiming.

DO Lead with simplicity and connected workflows. Say country-aware payroll. Describe AI as optional and permission-aware. Use customer-specific examples after discovery.	DO NOT Do not call Tork a traditional CRM. Do not promise every statutory calculation in every country. Do not imply all users see all modules. Do not position Sheets as a full Excel replacement.
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The story to remember



Tork makes the company easier to understand - then gives each person only the part they need.