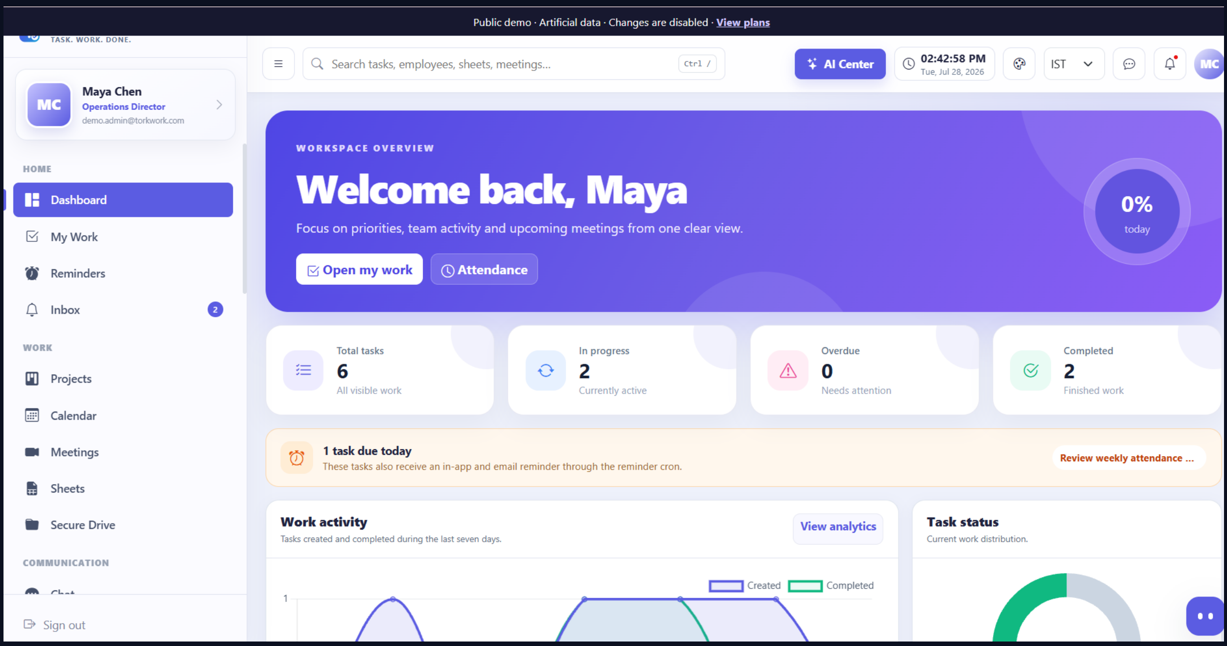
TORK

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

01 / POSITIONING

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.”

02 / WHO TO TARGET

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.

03 / CORE WORKFLOW

Three loops explain almost the whole product.

Use these before showing individual screens.

CUSTOMER & DELIVERY

Customer → Confirmed → Project → Tasks → Invoice

No CRM stage overload.

PEOPLE & PAY

Employee → Attendance → Leave → Country Payroll → Payslip

Presence and pay remain connected.

SUPPORT

Ticket → Assign → Work → Resolve → Close

Every issue has ownership and closure.

04 / PRODUCT MAP

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

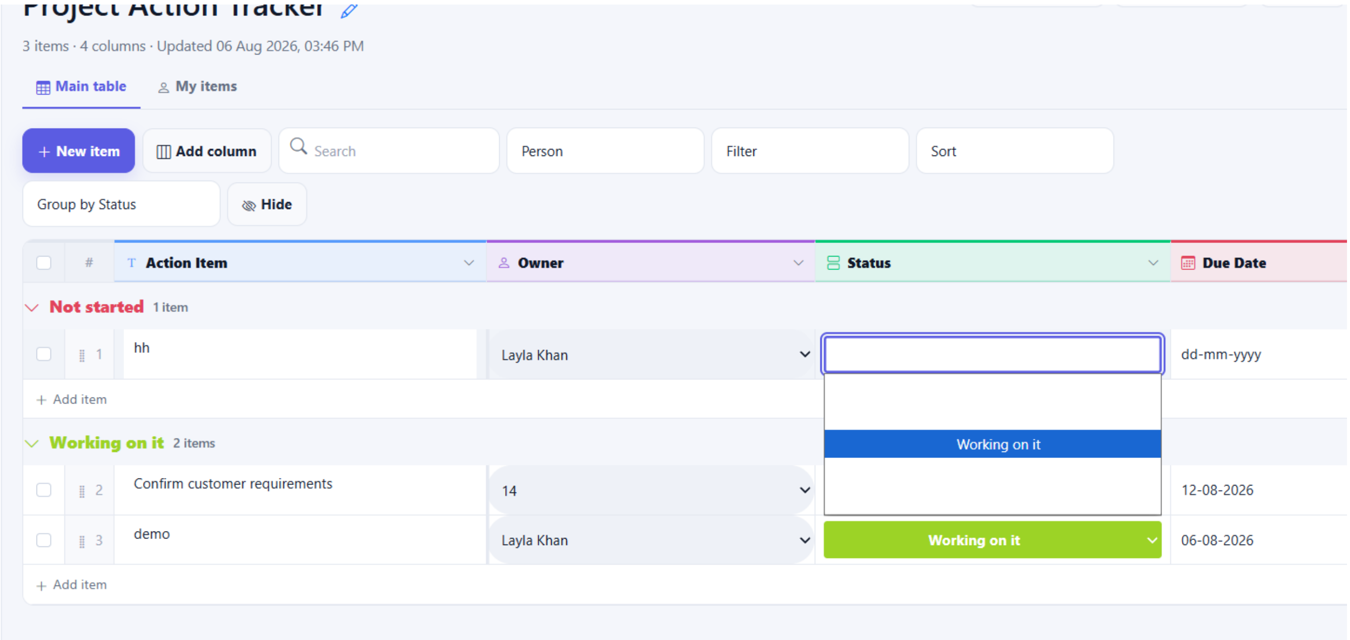
CONTROL
Reports • Audit • Access Management • Settings

05 / DEMO STORY

Show outcomes, not feature menus.

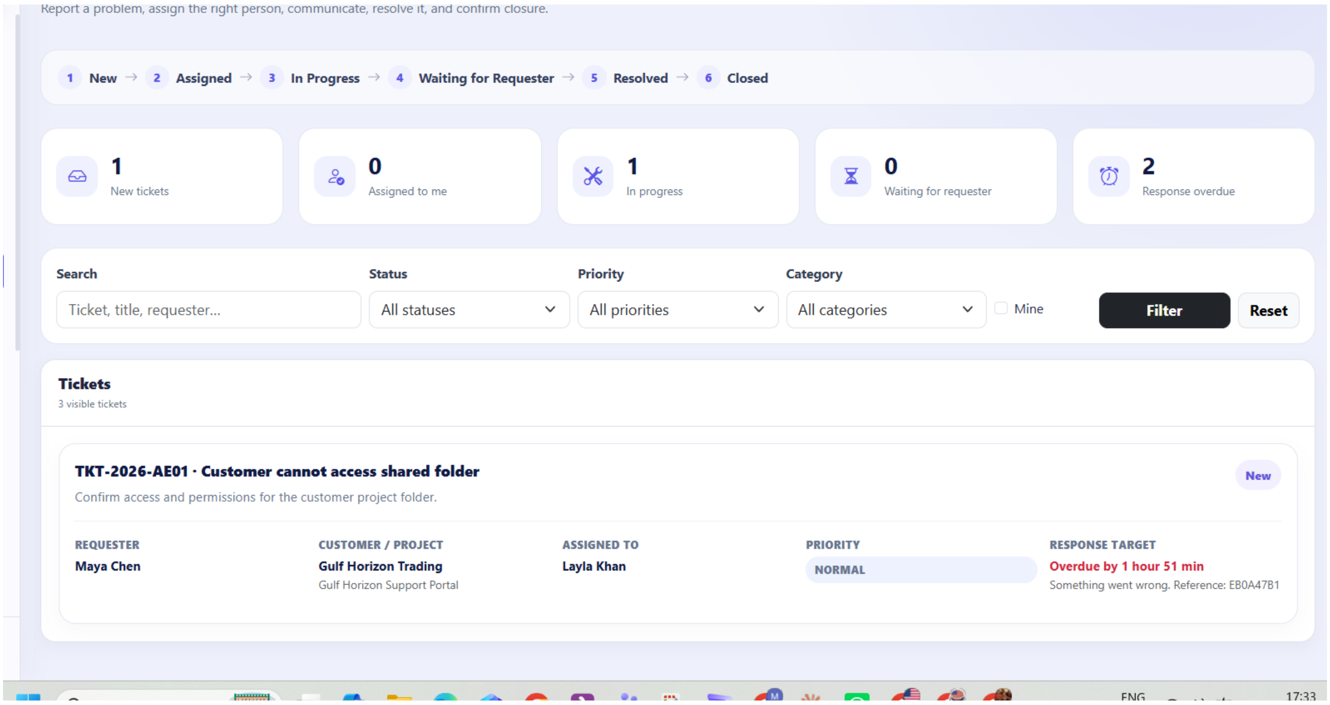
Use one connected example and move through the work.

SHEETS



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

SUPPORT

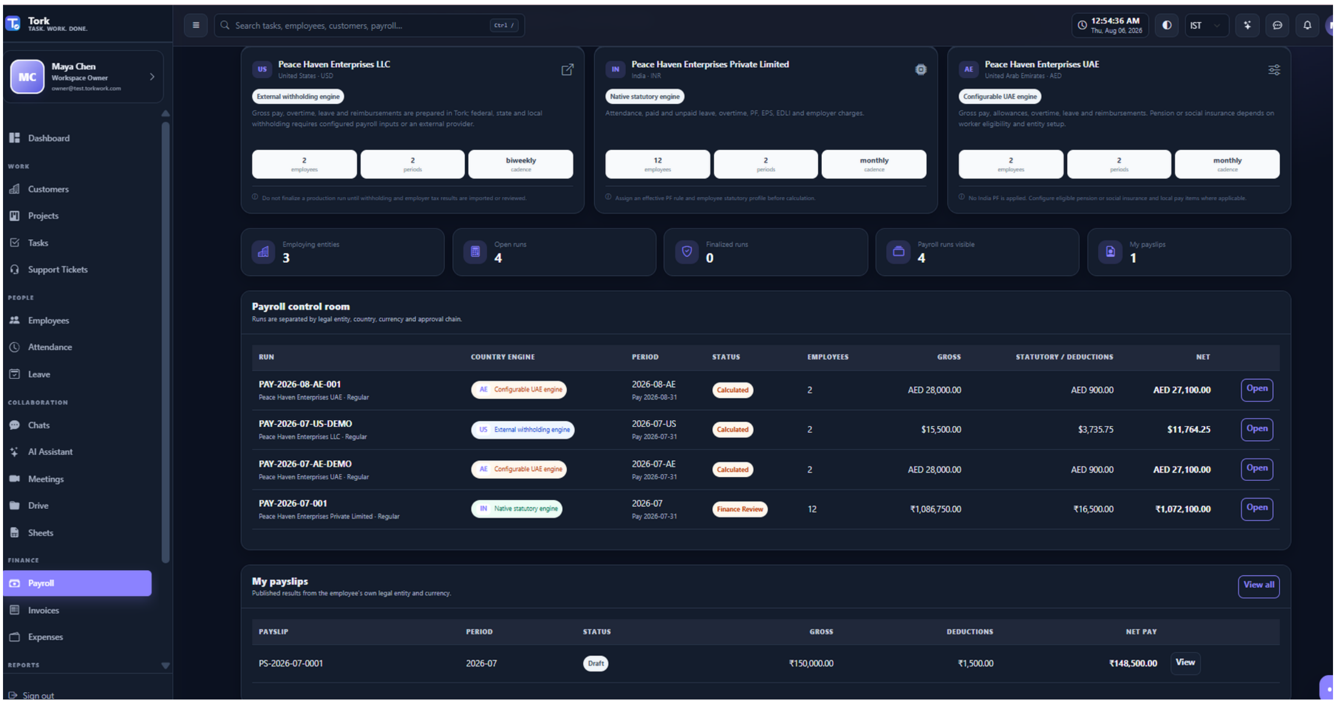


Explain ticket ownership from creation through assignment, replies, SLA, resolution and closure.

06 / GLOBAL PAYROLL

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

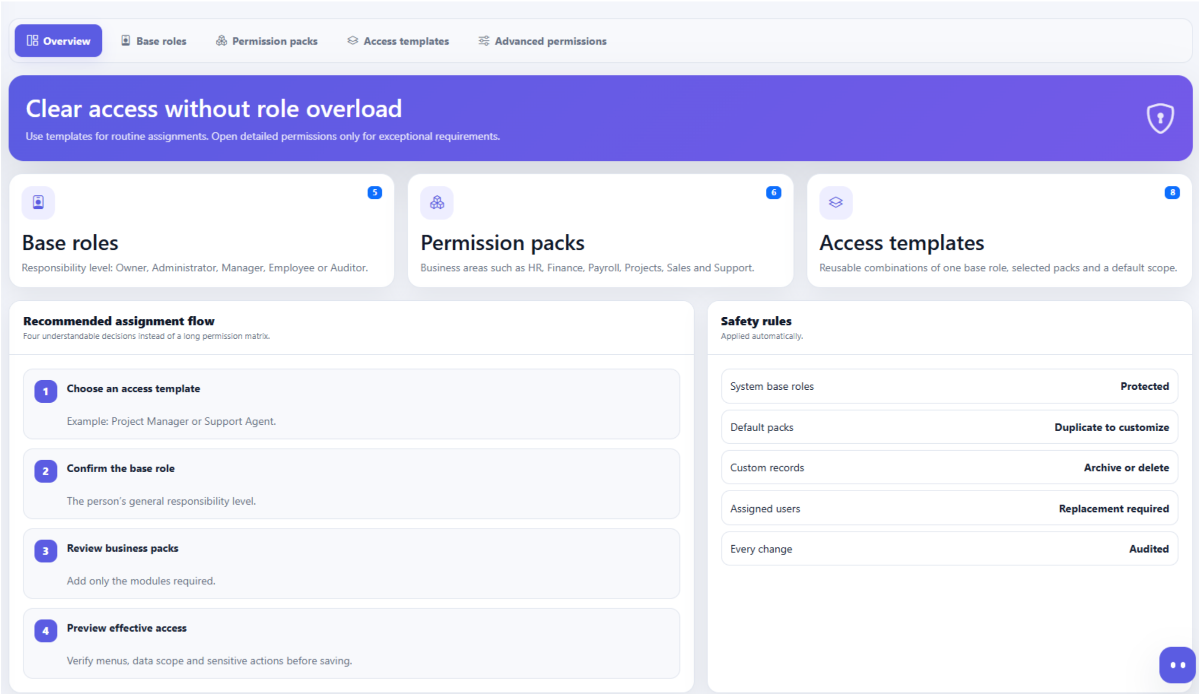
Configurable allowances, deductions and eligibility-based pension or social insurance items.

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

07 / ACCESS MODEL

Make permissions feel simple before showing detail.

Normal assignment should not require understanding hundreds of permission rows.



Base role → Permission packs → Scope → Effective access

- 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.

08 / TALK TRACK

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.

09 / 12-MINUTE DEMO

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.

10 / QUALIFICATION

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	DO NOT
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 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.

The story to remember

Customer → Work → People → Support → Finance

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