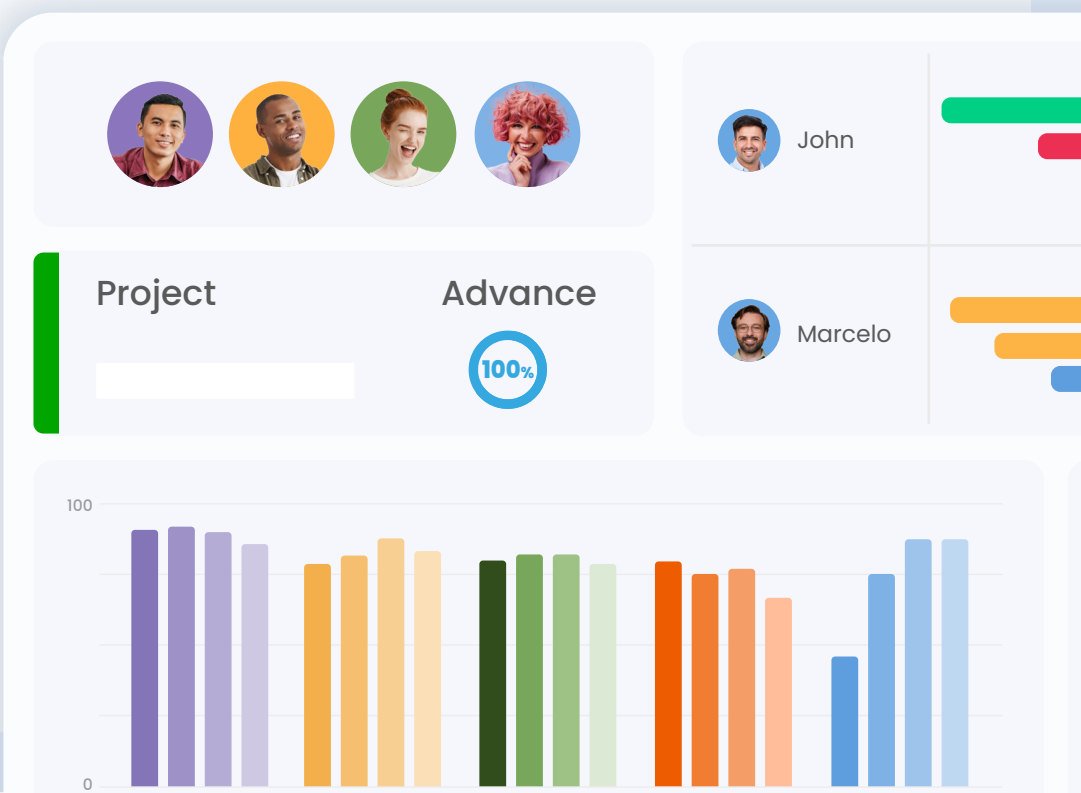




Customer Role

Real-time visibility of your projects.



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Introduction

As a Customer Role we recognize that what's most important to you is having clear and fluid visibility into... The status of your projects, without wasting time or dealing with multiple communication channels. That's why, at COR, we created Customer Role, a tool designed to give you exactly what you need: control, transparency, and the ability to closely monitor each progress in a personalized way.

What does the Customer Role function do?

The Customer Role function allows you to centralize all communication with your agency in one place. Through it, you will have direct access to your project's progress, enabling you to monitor the agency team's progress and the hours invested in real time.

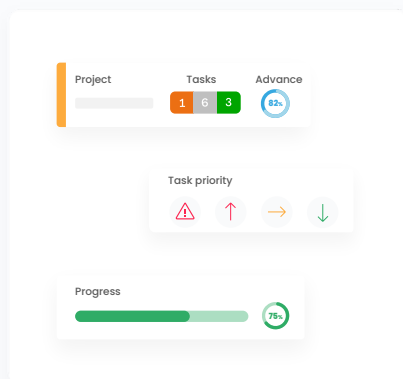
With Customer Role Role, you'll have all the essential information at your fingertips, allowing you to identify deviations and generate valuable insights for each project. This tool provides a strategic advantage in managing your projects and in future negotiations. Furthermore, you'll always be up-to-date, which will speed up decision-making and strengthen your relationship with the agency.

01

Why is COR's "Customer Role" a valuable ally in your agency relationship?

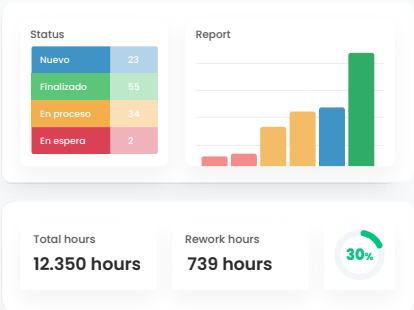
Below, we present the main benefits you will receive.

Real-time visibility.



They will be able to track the progress of their projects and clearly understand the team's work. This approach promotes traceability of the agency's workflow, improves organization between teams, and reduces the need for multiple communication channels, accelerating feedback. This visibility helps align expectations and priorities regarding deadlines.

Transparency and reassessment



One of the great advantages of Customer Role is the traceability it offers. By having clear visibility of the work done and the hours dedicated, you can better understand the value the agency brings, which will facilitate the renegotiation of fees in an organic way and based on real data. This transparency not only benefits you, but also strengthens collaboration and trust with your agency.

Enhanced communication

The interface shows a task management form with fields for Deadline, Team, Task description, and Estimated hours. It also includes tabs for Detail, Files, History, and Hours.

Deadline

Team

Task description

Estimated hours

Detail Files History Hours

By unifying project requests and feedback delivery into a single channel, Customer Role facilitates fluid and direct communication, with access to instant messaging, file uploads, deadline assignments, and instant messaging — all centralized on a single platform. This not only optimizes your time but also reduces rework.

Ensuring that everything progresses clearly and efficiently. With Customer Role, you have the opportunity to stay informed and connected, and you can also provide feedback at different stages of the project, make approvals, upload files, and request rework in an organized and transparent way with the entire team. This allows you to play an active role in the production process.

"The Customer Function is the ideal solution to improve communication, optimize organization, and deliver a clear and valuable experience. All concentrated in one place, without complications."

02

Relevant content

Depending on the selected configuration, it can provide different types of content to meet your needs.



Our Help Center.



Send an email directly to our support team.

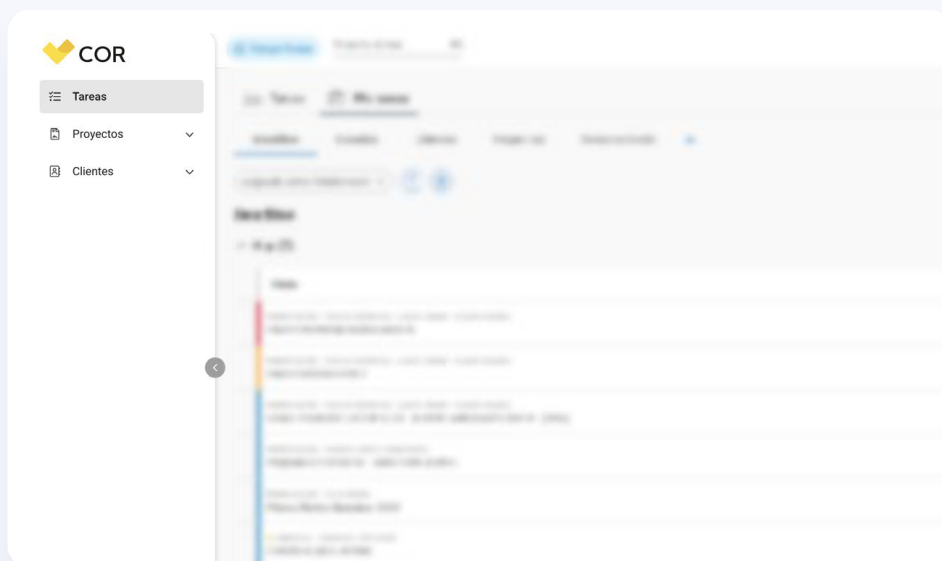


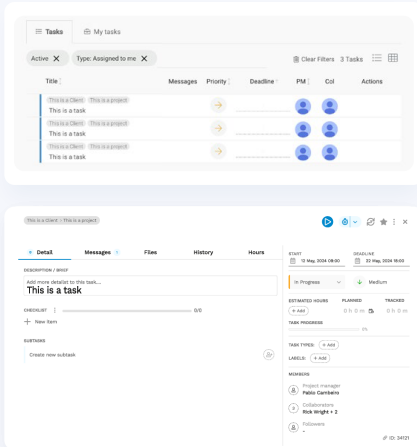
Our COR Academy, where you can find explanatory videos.

03

What information will you be able to access?

The menu will consist of Tasks, Projects, and Customer Role, as shown below:





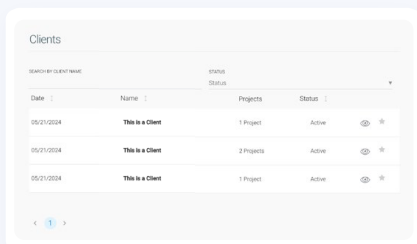
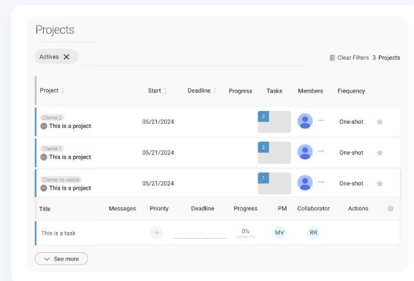
Under Tasks, you will only see tasks where the client is assigned as Project Manager, Collaborator, or Follower.

They are allowed to use all Task views:

- To-do list
- My tasks with the option to create custom dashboards
- Card viewing

Within Projects, you will see a list of projects comprised of:

- For projects where you've been assigned as a Member → you'll see all the tasks within the project where you're assigned as a PM, Contributor, or Follower.
- Those projects in which a task has been assigned, whether as a PM, Collaborator, or Follower.



Within Customer Role, you will see a list of Customer Role associated with the projects you have access to view. Within those projects, you will see a list of the projects they are involved in, and within those projects, the tasks they are part of.

04

Permissions and Visibility

By default, both Customer Role and the agency will be able to view an Insights section.

Inside, you will find:

Quantity.

- Tasks • Projects • Deliverables • Load time • Customer Role-type rework • Customer Role-type rework time

Project progress.

- Start and end dates • Associated brands • Project status
- Number of pending and completed tasks • Total progress of all tasks per project • Project duration in days

Hours consumed per rate in rate-based projects.

Number of Projects and Tasks per month.

Number of monthly deliveries.

Billed hours by function.

Time allocated by brand.

Hours billed per product.

Number of "Customer Role" type reworks per month and the hours they represent.

Conclusion

The Customer Role function not only enhances operational efficiency, but also provides the necessary control to ensure the success of your projects, delivering a collaborative, agile, and fully transparent experience at all times.



COR increases profitability by optimizing project management and team efficiency, enabling the renegotiation of rates with Customer Role and maximizing billable hours.

With COR, optimize the performance and profitability of your business.