

SELF-ASSESSMENT

The Eight Systems Readiness Checklist

A complete TERN account runs on eight systems. Check the box for every one that is fully built, tested, and working in your account today. The boxes you cannot check are where your account is quietly costing you.

01 ☐ **Complete Tag Library.** Status, source, trip type, budget, timing, supplier, and consent.

02 ☐ **Contact Workflows.** Automated sequences that fire from tags, not by hand.

03 ☐ **Trip Workflows.** Lead and post-booking, with tasks and timing set.

04 ☐ **Email Templates.** In your voice, and trip-type neutral so nothing misfires.

05 ☐ **Client Forms.** Lead capture, inquiry with scheduler, traveler profile.

06 ☐ **Itinerary Templates.** FIT, cruise plus land, and group with sub-trips.

07 ☐ **Payment Architecture.** Schedules, reminders, and commission hidden from clients.

08 ☐ **AI Assist.** You use TERN's AI features with confidence.

Count your checks. Every box you could not tick is a system that shows up in front of a client before it shows up for you.

Not all eight? Start with an audit.
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