

STOP LOSING TREE JOBS

The missed-call & booking field guide

A practical system for answering faster,
booking cleaner, and turning more
inquiries into estimates.

INSIDE

Scripts / Checklists / 7-day setup plan



A RINGING PHONE IS A CUSTOMER CHOOSING

When the crew is climbing, driving, estimating, or running equipment, the phone still asks for an immediate decision.

01 CALL ARRIVES

A homeowner has a real tree problem and is ready to talk.

02 NO ANSWER

Voicemail adds uncertainty and gives the caller another choice.

03 FAST RECOVERY

A useful text confirms the call and creates the next step.

04 ESTIMATE BOOKED

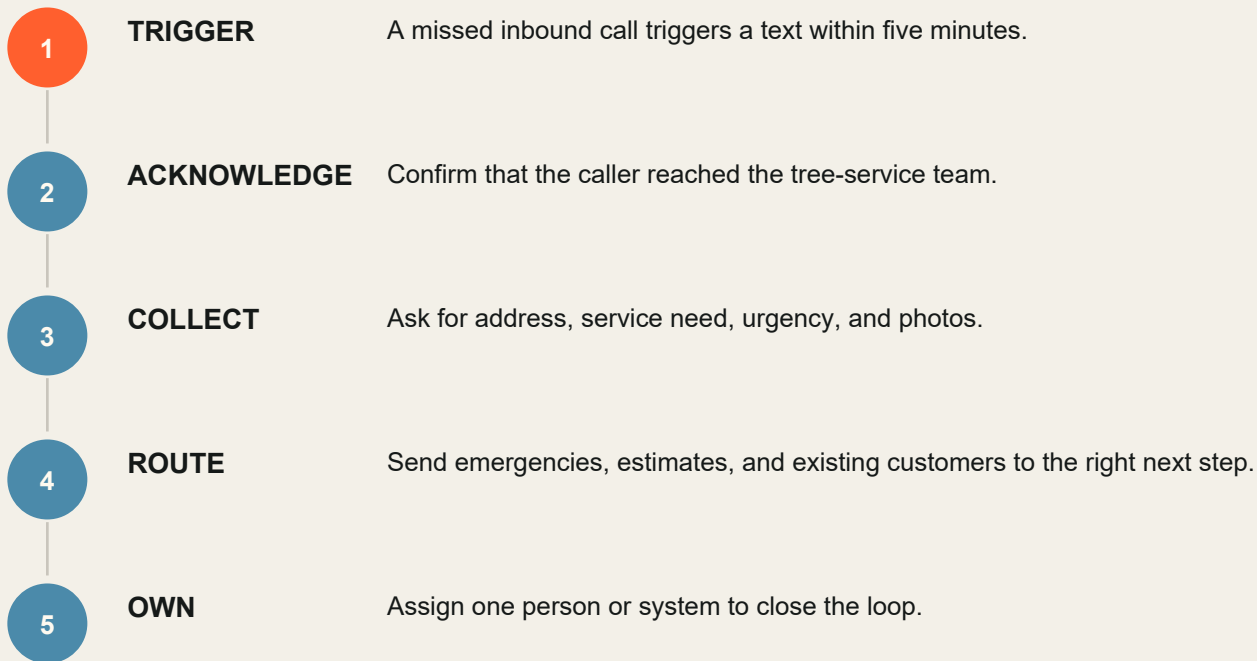
The lead becomes a complete intake record and a scheduled conversation.

THE RULE

Do not promise instant answers. Promise a dependable next step - and deliver it every time.

BUILD THE FIVE-MINUTE RESPONSE LAYER

Use the tools you already have. The goal is not complexity; it is a consistent handoff from missed call to useful conversation.



OWNER CHECK

Call your own business after hours. Note exactly what happens, how long it takes, and whether the next step is obvious.

MISSED-CALL TEXT TEMPLATES

Keep the first message short. Ask only for information that helps you respond safely and schedule the right next step.

STANDARD MISSED CALL

Hi, this is [Company]. Sorry we missed your call. What tree service do you need, and what is the property address? You can text photos here too.

AFTER HOURS

Thanks for calling [Company]. We are currently off the phone, but your message matters. Please text the address, the service needed, and whether anything is blocking a road, structure, or power line.

STORM OR URGENT DAMAGE

We received your call. If anyone is in immediate danger or a tree is touching utility lines, contact emergency services or the utility first. Otherwise, text the address and clear photos from a safe distance.

ESTIMATE FOLLOW-UP

Hi [Name], this is [Company] following up about the tree work at [Address]. Would you like to choose an estimate window, or is there anything we should know before we visit?

Replace bracketed text before using. Do not claim 24/7 availability unless the business truly provides it.

A THREE-MINUTE INBOUND CALL SCRIPT

A good intake call does not diagnose the tree. It gathers enough information to respond safely, qualify the opportunity, and book the estimate.

OPEN	Thanks for calling [Company]. This is [Name]. How can I help with the property today?
LOCATION	What is the service address, and are you the owner or authorized contact?
SCOPE	Is this removal, trimming, stump grinding, storm damage, or something else?
URGENCY	Is anything down, leaning, blocking access, touching a structure, or near utility lines?
ACCESS	Can our estimator access the tree safely? Any gates, pets, tenants, or parking limits?
VISUALS	Can you text two or three clear photos from a safe distance?
BOOK	I have [window A] or [window B]. Which works better?
CONFIRM	Great. We have [address], [service], and [time]. We will send confirmation to this number.

ONE COMPLETE LEAD RECORD

Print this page or reproduce it inside your CRM. A complete record keeps the estimator from restarting the conversation.

CUSTOMER NAME
BEST PHONE
EMAIL
SERVICE ADDRESS
SERVICE NEEDED
URGENCY / HAZARDS
ACCESS NOTES
PHOTO LINK / RECEIVED
ESTIMATE WINDOW
LEAD SOURCE
ASSIGNED TO

FROM BOOKED ESTIMATE TO PREPARED CREW

A booked estimate is not finished until the right person has the right information and the customer knows what happens next.

BEFORE THE ESTIMATE	AFTER THE ESTIMATE
☐ Confirm date and arrival window ☐ Verify address and contact ☐ Review photos and hazard notes ☐ Confirm access instructions ☐ Assign estimator	☐ Record scope and price ☐ Set follow-up date ☐ Send written estimate ☐ Note objections or choices ☐ Mark won, lost, or pending

CONFIRMATION TEXT

You are scheduled for [day/time window] at [address]. [Estimator] will contact you if timing changes. Please keep pets secured and make the work area accessible.

TRACK THE CHAIN ONCE A WEEK

You do not need a complicated dashboard. Count the moments that reveal whether leads are moving toward estimates and booked work.

WEEK OF	INBOUND CALLS	MISSED	RECOVERED	ESTIMATES	WON

ASK THESE THREE QUESTIONS

- ☐ Where did callers wait or disappear?
- ☐ Which lead sources produced real estimate opportunities?
- ☐ What one change will reduce friction next week?

YOUR SEVEN-DAY IMPLEMENTATION PLAN

Do one useful thing each day. At the end of the week, every missed call should have an owner and an obvious next step.

DAY 1	Call your own number	Test business hours, after hours, voicemail, and text response.
DAY 2	Choose the owner	Assign one person or system to missed-call follow-up.
DAY 3	Load the templates	Save the standard, after-hours, urgent, and follow-up texts.
DAY 4	Standardize intake	Use the checklist on page 6 for every new inquiry.
DAY 5	Clean the calendar	Offer two specific estimate windows and send confirmation.
DAY 6	Review five calls	Look for unanswered questions, weak handoffs, and delays.
DAY 7	Start the scorecard	Record the first weekly numbers and choose one improvement.

RUN THE 20-MINUTE RESPONSE AUDIT

Use four test calls to find the exact moment where a new inquiry slows down, loses context, or disappears.

TEST 1	BUSINESS HOURS	Call while the crew is working. Record who answers, what they ask, and whether an estimate can be scheduled.
TEST 2	AFTER HOURS	Call after closing. Check the voicemail, missed-call text, response time, and promised next step.
TEST 3	URGENT DAMAGE	Describe a storm-damaged tree. Confirm the response separates immediate danger from a normal estimate.
TEST 4	EXISTING CUSTOMER	Ask about a previously discussed job. Confirm the caller can reach the right record without restarting.

CHOOSE ONE FIX

Do not rebuild everything at once. Fix the first break that prevents a caller from reaching a clear next step, then run these four tests again.



OPTIONAL: TALK THROUGH THE RESULT