The AI Arborist Playbook

How to run a tree business in the age of AI

— and become the arborist a homeowner trusts over their house.

THE COMPLETE SYSTEM · NO FLUFF · FREE TO SHARE

THE EVERYTHING

Read this first

Ten years ago, running a proper tree business meant someone on the phone, a bookkeeper, and still working out the job, the rigging and the clean-up on a scrap of paper in the ute between sites.

Today, a good arborist with the right setup answers every homeowner's call the moment it lands, gets to the tree, proves he's insured, drops it safely, and turns one removal into the next tree and the annual prune — while a bigger outfit across town is still returning voicemails. And he spends zero nights on paperwork.

He's not smarter than you. He's not a better climber. And he's definitely not a computer person — one of the best we've seen was still writing jobs on the back of his glove two years ago. He just worked out one thing before everyone else: **the boring half of the business** — the enquiries, the follow-ups, the honest quotes, the insurance details, the clean-up and stump bookings, the invoices — can now do itself. So he put his energy where the money and the reputation are: up the tree doing it safely and right, and on becoming the arborist a homeowner trusts over their house.

This is the playbook for how he does it. No "50 prompts to copy". No tech-bro nonsense. The actual system — how to think about it, what to set up, in what order, and the mistakes that make good arborists give up before it clicks. Read it start to finish and you'll run a tighter, more profitable tree business than you do right now, even if you never spend a cent on software.

A STRAIGHT WORD ON WHAT STAYS YOURS

Nothing in here decides how a tree gets dropped, judges what's safe, or replaces your qualification, your insurance, or your read of a tree on site — and it never replaces your eye, your climbing, or the standards the work is done to. It carries the admin. Whether a tree can be saved or needs removing, how it's rigged and dropped without touching the house, and whether it's safe to work is a call you make on site, never a number a computer invents; how the cuts are made to keep a tree healthy is your craft; and being straight with a homeowner — and refusing to top a tree or quote one you haven't seen — stays with you. All of it stays yours, start to finish.

What's inside

01 CHAPTER ONE

The New Playing Field

A homeowner ringing round for a tree job can't see your past work or watch you climb. They judge you on what they can reach — and that's where most arborists quietly lose the best homeowners of the year.

Your customer is usually a homeowner with a tree over their house, car or fence — and the one thing they're really afraid of is the uninsured operator who drops a limb through the roof and leaves them wearing it. The job goes to whoever gets three things right first:

1. **Did you answer — and give a straight steer?** The first arborist to pick up and sound like a safe pair of hands wins the look. Let it ring out while you're up a tree and they ring the next one — and call whoever answered for every tree after.
2. **Are you insured and qualified?** The homeowner's real fear is the damage and the liability. A properly qualified, insured arborist who'll rig it down safely beats a cheaper uninsured bloke with a chainsaw, every time — because a limb through the roof is their problem.
3. **Will you do right by the tree?** Proper cuts, not topping; and an honest answer on whether the tree even needs removing. A homeowner can tell the difference between someone who knows trees and someone who just wants the big job.

Notice what none of those are about? Being the cheapest price. All three are about being reachable, insured and straight — the exact stuff that's easy to drop at the end of a day up trees. And the other side already runs on AI. The question isn't whether AI comes into tree work — it's whether it's working for you or against you.

The good news? This is the first time the technology favours the small operator. The big tree firms run committees, rollouts and training programs. You can decide on a Tuesday and be answering first by Friday. The playing field just flipped: the small, safe, insured arborist can now look and perform like the national outfit — without the overheads, and without a homeowner ever getting a voicemail when they've got a limb hanging over their roof.

“But I'm not a computer person”

Neither are the trades doing this best. One of the fastest adopters we've seen is a trade-business owner with 26 years on the tools who only picked up a computer three years ago. His words: **“Don't worry about spelling. Don't worry about grammar.”** If you can send a text or leave a voice message, you can run everything in this playbook. Being able to say what you want is the new requirement — and arborists, who talk a homeowner through a tree, the risks and the plan every day, are already good at that.

$200–800

+ per month

What job-management software commonly charges in AUD — and it still makes you do the typing and the chasing. One owner was paying a grand a month for tools his team barely used. Everything in this playbook either replaces that spend or makes it earn its keep.

The firms three times your size are slow because they're big. That's your opening. This playbook is about walking through it.

02 CHAPTER TWO

Think AI-First

Before we touch a single tool, we need to fix how you think about this — because the biggest mistake isn't buying the wrong software. It's bolting AI onto your old way of working and wondering why nothing changed.

Every process in your business was built on one assumption: a human has to do each step. Someone answers the call. Someone works out the job, the rigging and the clean-up. Someone tracks the insurance details, the stump bookings, the follow-ups. Your whole day is shaped around that assumption — and that assumption just died.

Don't automate your old process. Re-draw it — with the AI touching everything first, and you supervising. Three mental shifts:

Shift one — delegate outcomes, not steps

Stop thinking “which buttons do I click”. You now talk to your business the way you'd talk to a good groundie: say the outcome, let it work out the steps. One owner reorders gear by sending one message from the supplier counter — “grabbing a chain and rigging rope for the Nguyen removal” — and the order, the expense and the books sort themselves.

Shift two — AI first, you second

The AI does the first pass of everything, and you approve, tweak or overrule. The quote is drafted before you sit down. One customer described it: **“Nine times out of ten it's perfect. Just go — yep, send.”** Your job shrinks to ten seconds of judgment, not forty minutes of typing.

Shift three — corrections are investments

With normal software, you fix the same mistake forever. With AI, you fix it once. Tell it a standard quote always names the safe method, the clean-up and stump, and proves the insurance — and that you never give a firm figure on a tree you haven't seen, and never top a tree — and it answers, **“I'll remember that from now on.”** Every correction compounds. Six months in, it quotes like you, writes like you and knows your rules — because you taught it, once.

The re-imagining exercise

Walk your business and ask one question about every interaction: “What would this look like if the AI touched it first?”

INTERACTION	THE OLD WAY	AI-FIRST
Homeowner rings while you're up a tree	Voicemail. They ring the next arborist.	Answered and qualified, the look booked — a straight figure with the insurance noted by morning.
A storm drops a limb over someone's roof	You miss the call, they ring anyone available.	Answered 24/7, the hazard triaged, the make-safe booked first.
Supplier price-list update lands	Buried under 200 emails. Old rates on your next quote.	Extracted, applied to your rates — “chain and rope up, quotes adjusted.”
A job's done	Photos on the phone, follow-up never sent.	Clean-up confirmed, the review asked, the next tree and annual prune chased.

Every chapter from here is just this exercise applied to one part of your business.

03 CHAPTER THREE

Never Miss a Job Again

Let's start with the leak that costs you the most and hurts the least — because you never see the bill.

The tree lead is perishable: a homeowner getting a couple of quotes books whoever answers first and looks insured and safe, and the slow one never hears back — and a storm hazard goes to whoever picks up right now. The call buzzes at 4pm while you're up a tree with a saw in your hand. It rings out. That homeowner rings the next arborist, books the look, and now they're the one doing the tree — and the next tree, and the annual prune. Gone — and not just this job, maybe every tree that homeowner and their neighbours ever have.

First in
wins the homeowner

A homeowner with a tree over their house rings whoever picks up and looks insured and safe. A missed call isn't a deferred sale — it's the job, and often the repeat and the neighbours behind it, handed to whoever answered. And slow response drags your search ranking down, so it costs you the next one too.

Voicemail is where the best homeowners of the year go to die. The AI-first fix is bigger — because an enquiry is really two problems.

Problem one — the call you couldn't take

An AI receptionist answers in your business's name, 24/7, sounds calm and professional on the phone, and captures every detail — the tree, roughly its size, how close to the house or powerlines, whether it's a hazard right now — while you're up a tree or asleep. And it does the thing that wins the job: it answers first, every time, so you're the arborist who books the look while the others are still on voicemail — and it triages a genuine storm hazard to the front.

Problem two — the homeowner nobody kept

A tree business isn't won on one removal — it's won on becoming the arborist a homeowner calls for every tree, and the neighbours ask for. Most arborists do a job and never think past it. The one who answers first, proves he's insured, drops it safely and does right by the tree is the one that homeowner calls for the next tree, the annual prune, and recommends over the fence.

- ✓ Every enquiry answered in your business's name — including 6pm, including the weekend, including the night a storm puts half the town's trees over their roofs.
- ✓ A searchable record of every job — “what did we quote and do at the Rossi place, and what trees are due a prune?”
- ✓ Follow-ups that keep you in front of the homeowners who matter — so when the next tree or the annual prune comes up, you're the one they ring.
- ✓ Job details from the enquiry — the tree, the access, the hazard — flow straight into the look, not re-typed three times.

The phone stops being the thing that costs you the best homeowners and becomes the thing that books the look — and keeps you the arborist they call for every tree.

04 CHAPTER FOUR

Quote It Straight — Insurance and All

Tree work has a quoting shape most trades don't: half the value the homeowner is buying is that nothing goes wrong — no limb through the roof, no butchered tree, no liability landing on them. And none of that can be judged, or promised, down a phone line.

Insured and looked-at

and the firm phone price is the tell

A tree job is a scope AND a risk, not a per-tree rate: the assessment, the safe rigging and removal in controlled sections, protecting the house/fence/garden and the neighbours, the clean-up and chip, and the stump. The cheap number is usually an uninsured bloke with a chainsaw who'll fell it and hope — and if a limb goes through the roof, the homeowner wears it. Prove you're insured, look at the tree, rig it down safely, and price it straight — and you're the arborist a homeowner trusts over their house.

Here's the honest truth of this trade: **a firm price down the phone, sight-unseen, is the red flag — not the reassurance.** Nobody can price tree work properly without seeing the tree, its size and condition, how close it is to the house and powerlines, and the access and rigging. The honest move is to give a rough steer, then look at the tree before you commit a firm figure.

AI-first quoting makes that easy: the AI *qualifies* the job before you roll. Here's what that looks like in a real tree business today.

- ✓ **It asks the right questions first.** From the enquiry, the AI works through what actually sets the price and the risk — the tree, its size and proximity to the house/powerlines, the access, whether it's a hazard — so you book the look with the right information in hand.
- ✓ **It prices from YOUR structure.** Feed it your past jobs and it learns your rates and your rigging/clean-up costs — and drafts a straight figure with the safe method, the clean-up, the stump and the insurance named, not a flat per-tree number that hides them.
- ✓ **It leads with the insurance.** It doesn't forget to put your qualification and insurance up front — the exact thing the homeowner is screening for.

Do right by the tree

the honesty that keeps them

Here's the trust-maker of this trade: the cowboy always says “cut it down” (the bigger, easier job) and “tops” trees — a fast butcher-cut that looks like a prune but ruins the tree. The honest arborist knows tree health: makes proper cuts, never tops, and tells a homeowner straight when a tree can be saved or reduced instead of removed — even though removal is the bigger sale. “I won't cut down a tree that doesn't need it, and I won't butcher one that does” is a stronger pitch than upselling a removal, and it's exactly what brings the repeat work and the neighbour's tree next.

The look at the tree isn't friction — it's the sell

For any tree, the move is to give a rough steer, book the look and see the tree before you commit the number. Framed right, that's not a delay — it tells a homeowner you won't quote their tree blind and then hit them with a surprise, or drop a limb wrong. “I'll come and look, show you I'm insured, and give you a firm price and a safe plan” turns your care into the reason they picked you.

Then the bit everyone skips — staying in front of the homeowner. One message after a job: “All cleaned up and the stump's done — I'll give you a yell when that other one's due a prune.” That single habit wins more repeat trees than dropping your rate ever will. AI-first, that follow-up isn't a thing you remember. It's a thing that just happens.

THE POINT ISN'T THE SOFTWARE

It's the standard: look at the tree, prove you're insured, rig it down safely, make the right cuts, and be straight about remove-vs-save. An arborist with a notepad who hits that standard beats one with an app who doesn't. The AI just makes the standard effortless.

05 CHAPTER FIVE

Get Paid Without the Awkward Chase

You've won the job. Now you've got to get the money — and tree work is often a deposit for a booked removal, the balance on the day, with the odd variation when the tree turns out to be worse than it looked from the ground.

Deposit + on the day

no surprise variation

The single most reassuring thing you can do for a homeowner is be straight and steady on the money: a deposit to book a larger removal, the balance the day it's done and cleaned up, and any variation — a hollow trunk, a hidden hazard that changes the method — had as a *conversation before the work*, not sprung after. A surprise "extra" at the end is the exact thing that turns a repeat homeowner into a one-off. Steady, predictable billing isn't just fair — it's your strongest reason to be called back for the next tree.

The chasing is a system problem, not a people problem. Fix the system and you never have the awkward conversation again.

1. **Deposit to book a big one.** A clear deposit request when a larger removal's booked and looked at holds the date and covers the gear.
2. **Invoice on the day.** A "pay now" link the moment it's dropped and the site's cleaned beats "I'll send it later" — and a homeowner looking at a safely cleared, tidy yard is the most willing they'll ever be to pay.
3. **Flag the variation before it bites.** If the tree's worse than it looked and the method changes, the homeowner hears what it costs and why *before* the work goes on. A conversation, not an ambush.
4. **Escalate the tone only if you have to.** Most pay on nudge one or two. You stay the good guy the whole way.

Money is money: this is the one place you keep the AI on a short leash at the start. It drafts, you approve — until you've watched it be right for a month.

06 CHAPTER SIX

The Inbox That Runs Itself

Your inbox is where quiet money leaks out and stress leaks in.

Supplier statements, a homeowner confirming a booking, a council or strata job, a request for your insurance details, a photo of a tree to look at, a review notification, a past homeowner with the next tree — all mixed in with junk, all landing while you're up a tree with a saw in your hand. One trade owner started with a backlog of 24,000 emails: “I'd read one email, it'd get lost. I wouldn't even be able to find it again.”

AI-first, the inbox becomes something that's already handled by the time you look:

- ✓ **Triaged.** The three emails that matter today float to the top, flagged with why — “this one's a hazard, a split tree over the Rossi carport.”
- ✓ **Drafted.** Routine replies — “yes, we're fully insured, here's the certificate”, “we can come and look Thursday” — written and waiting. You glance, tweak, send.
- ✓ **Answered on demand.** “What did we quote the Rossi removal, and is the stump booked?” — and it finds it instantly.

THE PART NOBODY EXPECTS — IT GUARDS YOUR MONEY

Because the AI reads everything, it catches things. One business: “It's already saved me thousands in mis-ordered products — it said, hold on, based on your past jobs you probably want this one.” Another had a supplier accidentally invoice at a 50% discrepancy — flagged automatically before it was paid.

07 CHAPTER SEVEN

Your Digital Office Manager

Every tree business has an office manager. Usually it's you, doing it badly at 10pm.

One week
no office admin

One trade business's admin person went on leave for a week. The owner: “We haven't had her in the office for a week, and it's helped us do her job.” It ended up being one of their strongest weeks — not survive the week, one of their best — because the follow-ups and the chasing didn't stop when she did.

The morning brief

Before you turn the key: today's looks and jobs in order, which hazard needs making safe first, which homeowner should get a follow-up, who to chase for a deposit, and the one thing — an insurance certificate to send, a stump to book — that'll bite you if you forget it. Two minutes with a coffee — and your groundie knows too.

Job files that build themselves

Every photo, quote and job attaches itself to the right homeowner — so when they ring for the next tree, the whole history's there. The trees you did, what you charged, which ones are due a prune — all in one place.

The paperwork without the dread

The quote, the insurance certificate, the job record, the invoice — drafted, sent, and kept where you can find it, and there to prove you were insured and did it right if anything's ever queried. Never a substitute for your read of a tree or your climbing — just stopped from going missing.

08 CHAPTER EIGHT

Look Twice as Big as You Are

Here's a secret the big outfits rely on you not knowing: most of “looking professional” — and “looking like an arborist who won't put a limb through your roof” — is presentation, and presentation is now nearly free.

A one-ute operator and a fifty-person firm can send the identical, spotless, branded quote — and show the same fast response, the same insurance certificate, the same photos of a big tree dropped cleanly, and the same real reviews from homeowners. In a trade where a homeowner is trusting you over their house, the small operator who looks safe, insured and organised gets trusted like the big one — and kept for every tree.

The referral flywheel — on purpose, not by accident

1. **Retain** — answer first, prove you're insured, drop it safely and do right by the tree, so you're the arborist that homeowner calls for the next tree without shopping around.
2. **Review** — ask for the Google review the moment a homeowner's happiest, the day you've dropped a big one cleanly and cleared the site, automatically, with the link. Reviews and fast response lift your ranking — and a homeowner choosing an arborist leans on both.
3. **Refer** — tree work is on display: the neighbours watch a big tree come down safely, and the ones with their own trees ask who did it. The homeowner who trusted you tells the street. It's one of the strongest over-the-fence referral webs in the trades.
4. **Resell** — this is the whole game. Trees keep growing, so one homeowner isn't a removal, it's the next tree and the annual prune for years. It's all in the job file. A follow-up at the right time turns one tree into a decade of work.

START TODAY — EVEN WITH ZERO TECH

Ask every homeowner for a review the day you clear the site, and always leave the door open — “give us a yell when the others are due a prune, and send me to any neighbour with a tree.” A homeowner looking at a big tree you just dropped cleanly is the most receptive you'll ever find them.

09 CHAPTER NINE

The 30-Day Switch

Everything above works. The reason most arborists don't get it working is they try to do it all at once, get overwhelmed mid-job, and go back to the old way. So: one thing at a time, without stopping work.

1. **Week 1 — Stop the biggest leak: the missed call.** Every enquiry answered and qualified, a straight steer given, the look booked — and a storm hazard triaged to the front. This starts paying for the whole exercise immediately.
2. **Week 2 — Fix quoting.** The AI qualifies the job and drafts a straight figure with the safe method, clean-up and insurance named from your structure; you correct it — and every correction is a lesson it keeps. Look before any firm number, follow-up after every job.
3. **Week 3 — Fix getting paid.** Deposit to book a big one, the balance on the day, variations flagged early, automatic reminders — with you approving everything money-related until it's earned the leash.
4. **Week 4 — Hand over the back office.** Inbox triaged and drafted, morning brief running, job files and insurance records building themselves, reviews asked automatically, the next tree and annual prune chased.

Why all four? Because one process never feels like much. Three is where the “holy hell” moment happens — because that's when the pieces start talking to each other. The call becomes the look. The look becomes the safe, insured job. The job becomes the review, the payment on the day, and the next tree from the same homeowner.

The trust dial — how to hand over without losing sleep

You don't hand a new groundie the climbing line on day one. Same here:

1. **Weeks 1–2: it asks about everything.** Every email draft, every quote — “here's what I'd send, OK?” You approve, correct, teach.
2. **Weeks 3–4: it asks about the important stuff.** Routine replies just go; money, new homeowners, and anything with weight — quotes, remove-vs-save calls, hazards — still get your nod.
3. **Month two onward: it asks about exceptions.** Now it runs, and you get the morning brief and the flags. You're still the boss — you've just stopped being the bottleneck.

The mistakes that make good arborists quit before it clicks

- ✓ **Doing all four weeks at once.** Don't. One a week. Each banks a win before you add the next.
- ✓ **Bolting AI onto the old process.** If you're still typing every job into the same old software and asking AI to “help”, you've missed the point. Re-draw the process (Chapter 2).
- ✓ **Reaching for fake urgency.** You don't need it — a genuine hazard (a hung-up limb over the house) is real urgency you can act on honestly: “we can make that safe today.” A fake discount deadline just makes you look like the cowboy.
- ✓ **Competing on price.** The moment you win by being the cheapest, you're competing with the uninsured bloke who'll top the tree — and the homeowner's real fear is exactly that. A homeowner pays for a safe, insured arborist who does right by the tree — being trusted over their house wins every tree, not the lowest price.

✓ BEFORE YOU PUT THIS DOWN

The 2-Minute Leak Audit

Most arborists aren't short of skill — they're losing homeowners. Your money isn't in winning strangers on a cheap price; it's in becoming the arborist a homeowner calls for every tree, because one homeowner is the next tree and the annual prune for years and the referral to every neighbour with a tree. That's the tell: answer first, prove you're insured, drop it safely, do right by the tree. Be honest — tick the ones that are true right now.

- ✓ I'm often slow to answer calls — and I don't know how many homeowners the delay has cost me.
- ✓ A homeowner's call has rung out and I never knew, and they booked the next arborist.
- ✓ A storm hazard came in after hours and went to whoever picked up, not me.
- ✓ I've given a firm price down the phone on a tree I hadn't seen — and worn the loss.
- ✓ I don't lead with my insurance and qualification, so I look the same as the uninsured bloke.
- ✓ I don't stay in front of past homeowners, so they get the next tree done by someone else.
- ✓ My quotes, insurance details and job history live in my head and my phone, not in one place.
- ✓ I've quoted a removal on a tree that could've been saved, because that was the bigger job.
- ✓ My inbox stresses me out, and important stuff — an insurance request, a hazard — gets buried.
- ✓ If a homeowner asked me to prove I was insured, it'd take me a while to find the certificate.

0–2	3–6	7+
Tight ship. A few tweaks and you're the arborist more homeowners call for every tree.	You're losing real homeowners in the boring half — and it's all fixable. Start with Week 1.	Mate, you're doing the dangerous, skilled work and handing the homeowner to whoever answered first. Good news: it's exactly the stuff that's now easiest to fix.

The biggest lever isn't a cheaper price — it's answering first, proving you're insured and safe, and turning each homeowner into the next tree, the annual prune, and referrals to every neighbour with a tree. Your biggest tick is your biggest opportunity. Start there.

ONE LAST THING

Want it set up for you?

Everything in this playbook, you can build yourself — and you should, if you've got the time and the patience. Plenty do. If you'd rather it was just done — the AI that answers your phone the moment a homeowner rings, triages a storm hazard to the front, qualifies the job and books the look, drafts a straight quote with the safe method, clean-up, stump and your insurance named, takes the deposit and invoices on the day and flags a variation before it bites, keeps the insurance and job records that prove you did it right, and chases the next tree and the annual prune from every homeowner you've looked after — all in one, working in your tree business this week — that's what we build. It's called The Everything.

- ✓ 14-day free trial. Cancel anytime. No fixed contracts, no catch.
- ✓ Nothing important — a quote, an invoice, a homeowner's message — ever goes out without you seeing it first.
- ✓ It lives in Microsoft Teams and the tools you already use.

See it working on your own jobs at the-everything-app.com — no credit card to look.

Honest note: this won't fix a broken business, and it won't climb the tree, judge what's safe, or decide whether a tree can be saved — that's still you, your eye, and your qualification. What it fixes is the office job you've been doing for free after dark.