

Starting the Consultation Right

How to guide clients toward good tree care decisions



Apollo O'Neil

ISA Board Certified Master Arborist

O'Neil's Tree Service, Palm Harbor, Florida

Alabama Urban Forestry Association

Annual Conference, Orange Beach

Thursday, October 15, 2026



I was the regular tree guy

1

A landscape client asked me to trim a tree

I said yes. I did not know what I was doing.

2

An arborist told me to my face to get educated

About six months later I was an ISA Certified Arborist.

3

Then I went back to my customers

I told them what I had been doing to their trees was wrong.

I am not here to talk down the regular tree guy. I was him.



Order taker or consultant

ORDER TAKER

- “What do you need?”
- “I want my trees trimmed.”
- Writes “Trim trees.” Gets a signature. Drives off.
- **Never learned why they called.**

CONSULTANT

- Asks why before what.
- Finds the worry behind the request.
- Explains, gives options, and lets them decide.
- **Writes a plan the crew can follow.**

What is it the customer wants? Not what we think they want.



First, name the product

A product is a finished thing that someone will trade for.

ACTIVITY

- Hours worked
- Miles driven
- Estimates sent
- Being busy

PRODUCT

- A tree pruned to the plan
- A client who understood and agreed
- A write-up the crew can follow

If I can't say what I produce, I can't tell a good day from a busy one.



The product of a tree care company

Well done tree care services, in exchange for money.



It is done to the standard

ANSI A300 for the work. ANSI Z133 for doing it safely.



It answers what the client was worried about

Sometimes that means showing them it was not a problem.



It is paid for, at a price that keeps the company viable

Viable, and able to grow.

City or utility? Swap “money” for what you are trusted with: a budget, reliability, public support.



The product of a sales arborist

Tree care sold that I can be proud of, in the amount the business needs, written so the crew can carry it out.



The client

Concerns found.
Problems agreed on. A plan they understand.



The crew

A write-up they can follow without a phone call.



The company

Enough of the right work to stay viable and grow.

The test: if the crew or the office has to call me about the job, I did not finish.



The product of a consulting arborist

A client who has the information and can make the decision that is best for them.

ESTIMATE

Pricing a job we both already understand.

Free.

CONSULTATION

Findings, a risk assessment, my judgment.

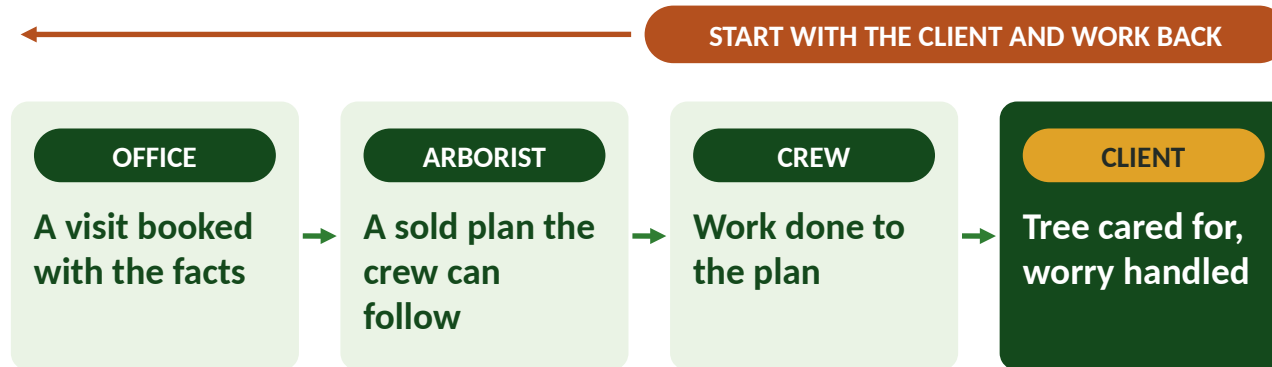
Paid. At my company, \$150, credited to the work if they go ahead.

“Consulting Arborists are the authoritative experts on trees and bring an objective, comprehensive viewpoint to their clients.”

American Society of Consulting Arborists



Find your own: work it backward



- 1 What does the client end up holding?
- 2 What does each position hand to the next?
- 3 Could the next person use it without calling you?

Write yours in one sentence before you leave today.



WHY NOT JUST SAY YES

Would you trust this doctor?

PATIENT

"Doc, cut my kidney out."

DOCTOR

"Okay."

CLIENT

"Cut it back to the roofline."

ARBORIST

"Okay."

Are you at the right guy?

In selling, as in medicine, prescription before diagnosis is malpractice.

Alessandra, Wexler and Barrera, Non-Manipulative Selling



What we already agreed to

ISA CODE OF ETHICS

- “Comply with all accepted professional standards...”
- “...objective and independent professional judgment...”
- “...truthful and accurate representations ... in the preparation of estimates concerning costs, services and expected results.”

ANSI A300, PRUNING (CLAUSE 5 OF THE 2023 EDITION)

- Set the objective first, then specify the work that meets it.
- Topping and lion’s tailing are named as not acceptable.
- No fixed percentage that I can find. TCIA reported the 25 percent line coming out in 2017.

“I signed a code of ethics when I earned my credentials. What good are those credentials if I don’t uphold it?”



ISA Code of Ethics I.A.2, II.A.1, II.A.6. A300 points as reported by TCIA and TCI Magazine (Kempter 2016; Rasmussen 2026).

AUFA Annual Conference 2026 | Starting the Consultation Right

Why clients ask for the wrong thing

Fear

was the primary motivation for topping, in interviews with 83 owners of topped trees

Fazio and Krumpel 1999

51%

of homeowners who chose topping believed it would lengthen the tree's life

Close et al. 2001

31

US deaths a year from wind-related tree failures, 1995 to 2007. About 1 person in 9.7 million.

Schmidlin 2009; Klein et al. 2019

When you're scared, you make a bad choice a lot of times.

So the first job is to find out what they are afraid of, and whether it is true.



The visit I aim for, start to finish

- 0 Before you pull in
- 1 People first
- 2 Ask permission
- 3 Find the two whys
- 4 Walk and show
- 5 Options, then their decision
- 6 Write it for two readers
- 7 Follow up with help

Borrowed from the doctor's SOAP note

- | | |
|--|---|
| S Subjective: what they worry about, in their words | O Objective: what they want to accomplish |
| A Assessment: is it possible, and what do I need to find out | P Plan: the prescription |



I do not hit every step on every visit. This is what I aim for.

It starts before you pull in



Ask on the booking call

“How do you feel about your trees?” The answer tells me what kind of visit I am walking into.



Send something that teaches

Short videos, plus the name and photo of the arborist who is coming.



Offer the choice

A free estimate for a known job, or a paid consultation for advice.

Utility and municipal: your step 0 is the knock on the door before the crew arrives.



People first, trees second

We are not in the tree business. We are in the people business.

TWELVE QUESTIONS ON EVERY SITE

- “Do you have a dog? What kind?”
- “How long have you lived here?”
- “What’s your favorite tree on the property?”
- “Have you hired a tree service before? If so, why didn’t you call them back?”

THE RULES

- At least twelve, every site.
- Sincere, or don’t ask.
- End each remark with a question.

Quick and out of there tends to leave a price-driven customer.



Ask before you point things out

THE PERMISSION QUESTION

“I just want to let you know, I’m an arborist, and as we walk I may notice things going on with your trees and plants. Would it be helpful if I pointed those out to you?”

Yes, almost always

Now I can talk about anything on the property without being a salesman about it.

No

Respect it. Handle what they asked for and keep it short.

UTILITY

“Before I mark anything, can I show you what the line needs and what I see in this tree?”

MUNICIPAL

“While I’m here about the sidewalk, would it help if I told you what I see in this tree?”



Asking permission before giving advice is also part of motivational interviewing (Miller and Rollnick).

AUFA Annual Conference 2026 | Starting the Consultation Right

STEP 3

Find the two whys

CLIENT

"I want all these branches removed over my home."

Why 1: what they said

ARBORIST

"Okay. Why do you want to do that? Are you worried about them, or did someone tell you they aren't safe?"

CLIENT

"Actually, a man knocked on my door and told me they were going to fall on my home."

Why 2: what is driving it

Then say it back in one sentence and get a yes.



Ask what they want most

"I WANT IT SAFE."

↑↓ *these conflict*

"AND NO LEAVES IN MY GUTTER."

- Fewer leaves means less energy for the tree.
- Bigger cuts mean bigger wounds.
- Over time, both can raise the odds of a failure.



SAY THIS

"Okay, so let's make sure we clarify what it is that you do want most."

Asked that way, the answer is almost always safety.



Walk the property and show them

SHOW IT

- A frond held up to the light
- A twig snapped over white paper
- The healthier tree across the street
- A laser pointer on the cut locations

USE THE ACCURATE WORD

- **A seam** is not a crack.
- **Declining** is not dead.
- **Water sprouts** are not suckers.

The crew cuts what the words say.

Don't say it is unless you know for sure.

If I don't know, I say so, and I say what I will do to find out.



Can they explain it to their spouse?

The shopping bag

"You don't hold it out here. You bring it in. Too heavy? Take some out."

Why we prune at the ends

The surgery scar

"Do you want a surgery with a massive scar? Trees don't either."

Why cuts stay small

Six meals a day

"Six meals a day cut down to two. Now you've got a problem."

Why the leaves stay

Old people

"Old trees are like old people. They do not like change."

Why big trees decline after construction

Then check it: ask them to tell you what we are doing and why.



Teach-back, and one to three key points: AHRQ Health Literacy Universal Precautions Toolkit (2024).

AUFA Annual Conference 2026 | Starting the Consultation Right

Options, then their decision

1

Say there is a choice

“It’s your property. It’s up to you what you do.”

2

Lay out the options and what each one costs them

Itemize. Mark the one I recommend. Name the tradeoff.

3

Ask what matters most, then step back

“They need all the information. Then it’s their decision.”

WHEN THEY ASK WHAT I WOULD DO

“How about I put myself in your shoes, at your age, but knowing what I know. Does that sound better?”

If you wouldn’t do it for your own grandmother, why would you do it for a customer?



Choice talk, option talk, decision talk: Elwyn et al. 2012.

AUFA Annual Conference 2026 | Starting the Consultation Right

The cable I left off



A two-stem union. Not the tree in this story.

1

To save a client money, I recommended reduction pruning only. No cables.

2

That tree later broke.

THE CLIENT'S TEST

"I cannot hire you if you cannot hold your ground, even with me trying to convince you."

Holding back a recommendation is deciding for the client.



Say what the work will not do

“Leaves will still fall in your gutters and pool.”

“It is going to look bad for about six months.”

“This is what I think the prognosis is. I am not always correct.”

“Will they live without me? Yes. Don’t let me scare you into doing it.”

34 of 43

About that many of my consultations this year, where I named a limit: what the work will not do, or what I cannot promise.

No pruning makes a tree hurricane proof. Better odds is all anyone can promise.



STEP 6

Write it for two readers

EVERY LINE CARRIES

1 The concern, theirs or mine

2 The objective

3 The prescription

"Because the crew isn't the ones that had that conversation."

TELLS THE CREW ALMOST NOTHING

"Trim trees." "Prune per ANSI A300."

THE CREW CAN FOLLOW IT

Live oak, front yard. Concern: long limb over the roof.

Objective: less end weight; 6 to 8 feet of roof clearance.

Prescription: 5 to 10 reduction cuts, 2 to 3 inches, at the branch ends. No live cut over 3 inches.

Note: leaves will still fall in the gutters.

"The A300 standards are performance standards, not work specifications."



Rasmussen, TCI Magazine, March 2026. The 3 inch cap is my company's rule.

AUFA Annual Conference 2026 | Starting the Consultation Right

23



Follow up with help, not a check-in

Checking in is asking for the sale with extra words.



Send what answers their question

The article or video on the thing they asked about on site.



Tie it to what they told me

Their favorite tree. The grandkids' play area. The neighbor's oak.



Keep going until yes, no, or a negotiation

All three are wins, because all three end the file.

The notes test: could someone who was never on site write the follow-up from my notes?



Built on Marcus Sheridan's assignment selling (They Ask, You Answer).

AUFA Annual Conference 2026 | Starting the Consultation Right

Why we cost more, and how to say it

WHAT CLIENTS BUY, AS I WAS TAUGHT IT

- 1 Trust in the salesperson
- 2 Credibility and image of the company
- 3 The product and service
- 4 **The cost**
- 5 When it can be done

HOW I SAY IT

Name the extra thing they get:
the certified arborist on site, the
insurance, the lawn protection,
the cleanup.

Then say it:

“That does cost more.”

What I hear back:

*“Oh, that makes sense. That’s
why it costs more.”*

Cost is still the number one complaint about my company. I say that too.



Four ways to hold the price

1

Compare scope, not totals

"Show me that it's apples to apples. Show me the proposal."

2

No price match. Add value.

"I can't do that. What I can do is add this."

3

Lower price, smaller scope

Never discount without a reason. Put the change in writing.

4

Share the risk

"If the tree dies within a year, half of what you paid goes toward the removal."

And I have discounted: about \$1,000 for a repeat client who was over budget, written up as a past customer discount.



The FTC and ISA both tell consumers not to default to the lowest bid.

AUFA Annual Conference 2026 | Starting the Consultation Right

Stand apart without running anyone down



Start with my own story

I was the regular tree guy.



Put the research paper against the other guy

Not myself. Let the client turn the lightbulb on.



Say what is true and good about the competitor

“He’s good. He just doesn’t know the history.”



Name the part that is hard to find

“The reduction pruning I described, that’s the part that’s hard to find.”

“I just passed the test. What you have to figure out is, can you trust me?”



Same steps, different client

	Commercial	Municipal	Utility
The client	Homeowner, board, manager, builder	Resident, council, public works	Customer or landowner at the line
The hard ask	"Cut it back to the roofline."	"Remove that street tree. It's messy."	"Round it over." "Don't touch my tree."
Open with	The permission question	Asking before telling	A knock before the crew arrives
Put in writing	Concern, objective, prescription	The policy, the risk rating, the options	The clearance, the reason, what can flex

**ISA tests this: Customer Relations is 20% of the Utility Specialist exam.
Communication and Public Education is 21% of the Certified Urban Forest Professional exam.**



ISA exam outlines, 2021 and 2024. Municipal and utility columns are built from published guidance, not my own jobs.

AUFA Annual Conference 2026 | Starting the Consultation Right

Role-play: what is behind the ask?

A

Homeowner

"I want every branch over my house cut off."

B

Property manager

"Get me a bid to trim the trees."

C

City resident

"That street tree drops leaves all over my yard. I want it gone."

D

Utility customer

"You are not touching my tree."

Run steps 2 and 3 only. Two minutes each. The client keeps the reason until it is earned.

Debrief: did the arborist find out why the client called?



The consultation on one page

- 0 **Before:** ask how they feel about their trees.
- 1 **People first:** at least twelve sincere questions.
- 2 **Permission:** “Would it be helpful if I pointed those out?”
- 3 **Two whys:** “Why do you want to do that?” What matters most?
- 4 **Walk and show:** accurate words. Don’t say it is unless you know.
- 5 **Options:** all the information, the limits, then their decision.
- 6 **Write it:** concern, objective, prescription. No call from the crew.
- 7 **Follow up:** with help, until yes, no, or a negotiation.



FRIDAY, 11:00 AM

Tomorrow we do this on live trees



Graham Creek Nature Preserve

23460 Wolf Bay Dr., Foley
Friday, 11:00 AM to noon



Bring

One harmful request a client
has asked you for.
Walking shoes.

Questions?

Apollo O'Neil

apollo@oneilstreeservice.com
OneilsTreeService.com

*The pre-visit videos I mentioned are at
prospectprimer.com. That is my own product.*



Slides, field card and
sources

apollooneil.com/resources



SOURCES

Where the numbers come from

Clients and risk

Fazio and Krumpe 1999. Underlying beliefs and attitudes about topping trees. J. Arboric. 25(4).

Close, Groninger, Mangun, Roth 2001. Homeowners' opinions on the practice and effects of topping trees. J. Arboric. 27(3).

Schmidlin 2009. Human fatalities from wind-related tree failures in the United States, 1995-2007. Natural Hazards 50.

Klein, Koeser, Hauer, Hansen, Escobedo 2019. Risk assessment and risk perception of trees. Arboric. Urban For. 45(1).

Ethics and standards

ISA Code of Ethics. isa-arbor.com/code-of-ethics
ANSI A300 Tree Care Standards (2023). Tree Care Industry Association.

Kempton 2016, TCIA. Rasmussen 2026, Stop Pruning Malpractice with a Prescription, TCI Magazine.

Communication

AHRQ 2024. Health Literacy Universal Precautions Toolkit, Tools 4 and 5.

Elwyn et al. 2012. Shared decision making: a model for clinical practice. J. Gen. Intern. Med. 27(10).

Miller and Rollnick 2013, as summarized in SAMHSA TIP 35 (2019).

Alessandra, Wexler, Barrera 1987. Non-Manipulative Selling.

Sheridan 2019. They Ask, You Answer, 2nd ed.

Roles and exams

American Society of Consulting Arborists. What is a Consulting Arborist?

ISA exam outlines: Utility Specialist (2021); Certified Urban Forest Professional (2024).

Federal Trade Commission 2025. How to avoid a home improvement scam. ISA 2021, Why Hire an Arborist.

My own material

43 of my consultations, April to October 2026, and my company's sales standard.

Studies I mention only out loud are listed in the notes for this slide.

