

Make the next 30 days count.

A working toolkit for tree surgery owners who want more suitable work, better follow-up and a clearer view of what each job contributes.

Start with one problem

Choose the row that sounds most like your business. Work on that first; the aim is a useful change you can measure, not a longer to-do list.

The diary has gaps

Check which services and areas you want more work in. Improve the enquiry route, publish one relevant job example and track the source of every new enquiry. Start on page 6.

Enquiries arrive, but quotes do not turn into work

Enter your recent enquiries in the workbook. Give each open enquiry an owner, a next action and a date. Review common unanswered questions. Start on pages 4-5.

The team is busy, but little is left over

Compare agreed job value, direct costs and team-days. Check the job mix and capacity before increasing marketing spend. Start on page 3.

Your first 30 minutes

Download the workbook. Open the separate Worked example tab, then enter your own last 20 genuine enquiries in Enquiries. If you have fewer, use what you have. Keep unknowns visible. Choose one priority in Action plan and put a review in the diary.

The pack contains this guide, an editable Excel workbook, the printable business plan and two quick-reference text checklists. The online calculator remains available at treesurgeonmarketingagency.co.uk/tools/marketing-break-even-calculator/.

A plan you can finish.

Pick an owner for each action and a realistic completion date. The workbook has an editable version of this plan.

Week 1 - find the constraint

Record recent genuine enquiries. Count suitable work, quotes and wins from that same group. Check available team-days. Choose one bottleneck and set a baseline: for example, eight open quotes, three missing a next action.

Week 2 - remove one obstacle

If you need demand, make the service, coverage and enquiry route clear on your website and profile. If quotes are stalling, make the scope and next step clearer. If returns are weak, review the direct costs of three recent jobs.

Week 3 - repeat a useful action

Publish one approved job example, follow up quotes where agreed, or test one enquiry source within a budget you choose. Record the work and its source. Do not change several channels at once if you want to understand the result.

Week 4 - review evidence and choose the next step

Update outcomes for the same enquiry group. Separate unsuitable work from lost quotes and open decisions. Compare capacity with booked work. Continue, change or stop your chosen activity based on the evidence you have.

A practical weekly rhythm

Monday: review capacity and overdue actions.

After each enquiry: record source, suitability and next step.

After each completed job: record actual costs and collect approved evidence.

Friday: update outcomes and choose three actions for next week.

Example success measure: "All open quotes have an owner and an agreed next step by Friday." Avoid targets that count activity alone, such as posting every day, without checking whether it helps customers choose you.

Know the work you need.

Use contribution and capacity together. A bigger invoice does not automatically mean a better use of a team-day.

Calculate contribution from a job

Agreed job value minus direct labour, disposal, fuel, job-specific hire and other delivery costs. Include a realistic cost for the owner's working time. Contribution still has to cover fixed overheads, marketing and profit; it is not take-home pay.

A fictional worked example

A £900 job with £500 of direct costs contributes £400. If one team takes one day, that is £400 per team-day.

Another job worth £1,500 with £900 of direct costs contributes £600. If it takes two team-days, that is £300 per team-day. The second job has a larger invoice but lower contribution per team-day. Access, travel, risk, season and repeat potential also matter.

Turn a marketing budget into a job target

If your monthly advertising and fees total £800 and an extra suitable job contributes £400, two genuinely additional jobs cover that marketing cost. At a 40% enquiry-to-job rate, plan for five suitable enquiries. If each job uses one team-day, check that two team-days are available.

These are fictional arithmetic examples, not market rates or promised results. Keep VAT treatment consistent. Booked work is not cash in the bank, and setup costs or additional overheads change the target. The online calculator includes recurring fees and first-month setup.

My monthly marketing costs / contribution per extra job / available team-days

The type of work I want more of, and why

Turn enquiries into a weekly decision.

The workbook is a small working register, not a replacement for your secure customer records.

1. Enter one genuine enquiry per row

Use a job reference, enquiry date, source and service/area. Exclude obvious spam and avoid duplicating the same enquiry when a customer phones after emailing. Mark suitability Yes, No or Review. Use Unknown when you cannot establish the source.

2. Keep the stages meaningful

New, Visit arranged, Quoted, Booked, Completed, or Lost. Retain the quote date after a win or loss. Enter the agreed booked value when known, then update direct costs with actuals. Write the reason for unsuitable or lost work.

3. Give open work a next step

Enter a next action, due date and owner. The Follow-up check column shows Due now, Scheduled, Add action/date or Closed. Filter it when planning the day. An action due today counts as Due now.

4. Read the Review tab

Choose enquiry start and end dates. The results follow the outcomes of those same enquiries, even when a job is booked later. Follow-up counts cover all dates. A blank denominator shows n.a., not a false 0% result.

Read the fictional example correctly

Six enquiries include one outside the service area. Five are suitable; four have quote dates; two are booked or completed. The suitable-enquiry win rate is $2 \div 5 = 40\%$. The quote win rate is $2 \div 4 = 50\%$. Open quotes may still convert, so neither rate is final.

The online calculator uses all genuine enquiries: in this example, $2 \div 6 = 33.3\%$, including the unsuitable enquiry. Use that rate there, not the 40% suitable-enquiry rate. The example never feeds your live results. The workbook covers 200 enquiry rows. Missing booked values are excluded from known value totals; complete the figures before comparing channels. Compare similar periods and job types, and allow time for open enquiries to progress.

Help customers take the next step.

Make the quotation and follow-up useful. A customer should understand what is included and what happens next.

Before sending a quotation

Check the requested work and location, site access, scope, waste removal, exclusions, price presentation, availability and the route to accept or ask a question. Confirm any job-specific permissions and constraints through your normal professional process. Do not guess from photographs alone.

An enquiry acknowledgement

“Thanks for getting in touch about [work] in [area]. To help arrange the next step, could you send [information needed]? I will [action] by [realistic date/time]. You can reach me on [number] if anything changes.”

A useful quote follow-up

“Hi [name], I’m checking that quote [reference] reached you. Is anything unclear about the scope, access or what we remove from site? If the timing has changed, let me know and I’ll update our records.”

Use this where a reply or follow-up is expected. Honour a request to stop. Agree a sensible next contact rather than sending repeated chasers.

When a quote is not accepted

Ask a short, optional question: “For our records, was it timing, scope, budget or something else?” Record the answer as given. Avoid assuming that every lost job was a price issue or that a discount would have won it.

The most common question our quotes leave unanswered

One change to the next quotation / owner / date

Make the right local work easier to find.

Start with a service you want more of and an area your team can serve reliably. Give customers enough evidence to decide whether to contact you.

Check the route from search to enquiry

Keep your Google Business Profile information accurate and complete. Check the phone number, hours, service details and website link. On the linked page, make the service, coverage and next step clear. Test the phone link and form on a real phone you use.

Publish evidence of the work you want

Choose one completed job matching that service. Explain the customer's request, your actual work and the visible outcome. Add approved before-and-after photos and link the story from the relevant service page. Use the worksheet on page 7.

Ask for honest feedback consistently

After completed work, invite a genuine review through your normal customer process. Do not offer rewards or ask only customers you expect to leave a positive review. Reply professionally without revealing private job details.

Test one source and record what happens

Write down the service, area, activity, spend cap and review date. Record genuine enquiries, suitable enquiries and booked work. A source producing cheaper calls can still be poor value if the work is unsuitable. Review the same enquiry group; do not compare this week's spend with unrelated old bookings.

Google's official guidance: Tips to improve local ranking; Tips to get more reviews; Maps content policy. Checked 24 September 2026. Complete information and genuine evidence support visibility; rankings and enquiries are not guaranteed.

My one source test: service / area / activity / budget cap / review date

Make one job into useful evidence.

Use this sheet after completed work. Keep private job details and permission records in your own secure system.

A fictional finished example

Hedge reduction in Stockport

The customer wanted an overgrown hedge reduced to make routine maintenance easier. The team carried out the agreed reduction and removed the cut material. The approved before-and-after photographs show the new height and the cleared working area. The customer's address and identifying details are not included.

Only publish claims you can support. Do not invent customer quotes, measurements or results. Take photographs only when safe, check permission and image rights, and remove unnecessary faces, house numbers, registrations and location metadata.

Service / general area / completion month

What did the customer want to achieve?

What did the team actually do, and what changed?

Approved photo filenames / factual captions / permission-record reference

Where will this appear, and what should an interested reader do next?

Choose next month's priority.

Spend 20 minutes on this after updating the workbook. Use what happened, not what you hoped would happen.

The enquiry period I reviewed, and the open decisions still outstanding

What produced suitable enquiries or useful booked work?

What prevented the next step: demand, response, scope, timing, price, capacity or something else?

One activity to continue / one to change or stop

My next action / owner / completion date / budget if relevant

Want a second pair of eyes?

Request a free four-minute video audit of your website, Google presence and local competitors. Tell Chris which bottleneck you found and the figures you are comfortable sharing. No call is required.

treesurgeonmarketingagency.co.uk/contact/

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