

Gather earlier photographs, visit notes and work descriptions that concern the same tree. Label what you know directly and what another person told you. A useful history gives the assessor context without presenting an old explanation as a current finding.

Connect the tree with its surroundings

During the walkthrough, use the same tree labels as the earlier enquiry. Point out the feature you wanted assessed and the surrounding space that matters to the discussion. Ask for an explanation in terms you understand before turning the conversation into a work instruction.

This tree-care planning guide from Progressive Tree Service focuses on tree history and the information needed to discuss it clearly.

The brief for an owner arranging work remotely

Label images and documents so a person away from the property can follow the discussion. Identify who is available on site and which questions that person can answer. Keep changes in the same record instead of leaving them in separate messages.

Questions to keep with the record

Which earlier records are relevant to the question being assessed now? What needs to be clarified during the visit? Ask for an explanation that connects the answer with the particular tree and proposed work, then record anything still unresolved.

A practical next step

Note what was explained and which points remain open. A question that needs further information should remain visible in the record.

Retain dates and tree labels so the history can be followed without guessing which visit is being described.

Check that the person on site has the same scope and tree labels as the person reviewing the proposal.