THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

Tree Service Insurance & Photo Handoff Playbook

A safe photo-request script and job handoff record for tree-service dispatchers, crews and homeowner updates.

Tree-service owners, estimators, office teams, and storm-response coordinators

GUIDE

Use this record after a storm or tree-damage inquiry so dispatch, the crew and the homeowner work from the same reported facts. Photos support a conversation; they do not establish site safety or insurance coverage.

START WITH A SAFE REQUEST

Ask whether the caller is currently in a safe place. Do not ask them to approach a damaged tree, unstable structure or utility line to obtain a photo. If they report immediate danger, use the business's emergency escalation process before continuing ordinary intake. A qualified crew decides what the site requires.

Copy and adapt: "If you already have photos taken from a safe place, please send those through [approved upload method]. Do not move closer or enter a damaged area to get a better picture. Our dispatcher will confirm the next step after reviewing the details."

PHOTO REQUEST CHECKLIST

- Wide view of the affected area, if already available.
- Visible contact with a house, roof, fence or other structure.
- Any visible utility proximity, described as reported rather than assessed.
- Access route, gate and parking constraints that the homeowner already knows.
- Date and approximate time the photos were taken.
- Permission to share the supplied photos with the assigned crew and any separately authorized recipient.

Keep original images. Label new annotations separately. Do not turn an unclear photo into a confident hazard assessment.

JOB HANDOFF RECORD

Job reference: [ ]. Caller and callback: [ ]. Site address: [ ]. Caller-reported event and time: [ ]. Current safe contact location: [ ]. Known access restrictions: [ ]. Photos received and source: [ ]. Caller-reported utility involvement: [ ]. Crew review required: [ ]. Next action owner: [ ]. Next update agreed for: [ ].

Separate three note lanes: what the caller reported, what a crew member observed, and what still needs inspection. Record who supplied each fact.

INSURANCE COMMUNICATION

Ask whether a claim has been opened and whether the homeowner wants a named recipient to receive the record. Use the approved channel and confirm that authorization before sharing. Keep claim references out of casual group messages.

Customer update: "We have your photos and the site details you reported. [Name or role] is reviewing [specific open item]. We will update you by [agreed time]. Your insurer makes coverage decisions; we can provide the work record and explain our proposed next step."

BEFORE DISPATCH CLOSES THE HANDOFF

Confirm the assigned crew accepted the record, the homeowner knows whether the next visit is an assessment or authorized work, and any cost or scope question is assigned to the responsible person. Do not label a request approved because photos arrived.

Review a completed handoff for missing facts, repeated questions and updates that were promised but not sent. Fix the field or owner responsible for the repeat problem.