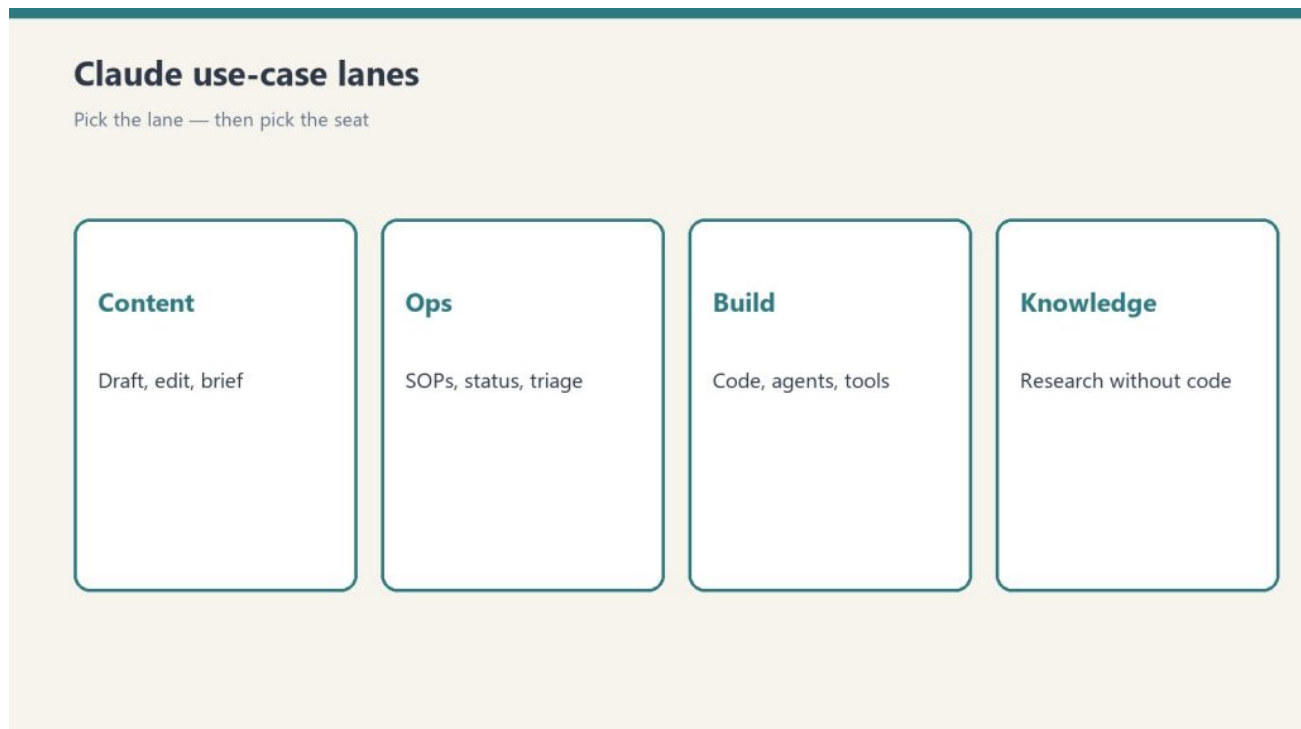


Build a Notion Second Brain for Your Restoration CRM

Who this is for: The person building your knowledge and relationship tracking system — your office manager, a tech-savvy ops person, or a consultant helping you get organized. This brief builds a Notion-based Second Brain layer that sits on top of your existing CRM to capture the relational intelligence that your job management software never will. No coding required. Full setup takes 3–4 hours. The strategy this supports is in [Your CRM Is Not a Lead Database](#).

What a Second Brain Does That Your CRM Doesn't



What a second brain does that your CRM doesn't.

Your job management software (ServiceTitan, Jobber, or similar) is built to track transactions: jobs, invoices, and technician assignments. It is exceptional at this. What it cannot do is capture the relational layer — who referred whom, who replied to your hiring email, which adjuster said they'd keep you in mind for the next CAT event, which homeowner's reply mentioned their neighbor's flooded basement.

This is the intelligence that determines whether your CRM becomes a community. It lives in email threads, in the notes field of your phone contacts, in your memory after a golf round with an adjuster. It disappears when your office manager leaves, when you switch phone carriers, when the thread buries itself under 400 new emails.

The Notion Second Brain captures this layer systematically. It's not a replacement for your CRM. It's a relationship intelligence layer that your CRM was never designed to hold.

The Architecture: Four Linked Databases



The architecture — four linked databases.

The system uses four Notion databases connected by relations. Notion's free tier supports all of this — you do not need a paid plan for the initial build. If you add more than five members, you'll need to upgrade to the Plus plan (\$10/user/month).

Database 1: Contacts

Your master contact registry. Every person in your network gets a record here. This does not replace your CRM contact list — it supplements it with relationship context that belongs in a knowledge management tool, not a job management tool.

Properties:

Field	Type	Notes
Name	Title	Full name
Segment	Select	Homeowner / Industry / Trade / Other
Sub-type	Select	Homeowner past client / Adjuster / Agent / PA / Sub / Supplier / Vendor
Email	Email	
Phone	Phone	
Company	Text	For industry and trade contacts
Location	Text	City or zip — for local filter
Warmth	Select	Hot / Warm / Cool / Cold — subjective relationship temperature
Last Touch Date	Date	Last time you had meaningful contact
Last Touch Type	Select	Email campaign / Personal email / Phone / In person
Times Referred	Number	How many referrals this contact has ever sent you
Notes	Text	Anything important that doesn't fit a field
CRM ID	Text	Matching ID in ServiceTitan or Jobber for cross-reference

Database 2: Touch Log

Every meaningful interaction with a contact gets an entry here. Campaign sends, personal replies, phone calls, in-person conversations. This is how you build a timeline of every relationship in your network.

Properties:

Field	Type	Notes
Touch Summary	Title	Brief description of the interaction
Contact	Relation → Contacts	Links to the contact record
Date	Date	
Touch Type	Select	Campaign email / Personal email / Phone / In person / Reply received
Direction	Select	Outbound (you reached out) / Inbound (they contacted you)

Field	Type	Notes
Signal	Select	Neutral / Positive / Referral Generated / Lead Mentioned / Complaint
Follow Up Needed	Checkbox	
Follow Up Date	Date	Only populate if Follow Up Needed is checked
Notes	Text	What was said or what happened

Database 3: Referrals

Every referral — whether it turned into a job or not — gets a record here. This is where you track the ROI of the community strategy over time.

Properties:

Field	Type	Notes
Referral Summary	Title	Brief description
Referred By	Relation → Contacts	Who sent it
Referred Person or Property	Text	Who or what was referred
Date Received	Date	
Source Touch	Relation → Touch Log	Which email or interaction triggered the referral
Outcome	Select	Job Won / Job Lost / Not Yet Followed Up / Not a Lead
Job Value	Number	Estimated or actual job value if won

Database 4: Campaign Calendar

This is the full campaign planning and results database from [the outreach calendar guide](#). It lives here in the Second Brain so that every campaign is linked to the contacts and touches it generates.

Setting Up the System in Notion: Step by Step



Setting up the system in Notion step by step.

Phase 1: Create the Workspace Structure (30 minutes)

1. Create a new page in Notion called “CRM Second Brain”
2. Add four sub-pages, one per database: Contacts, Touch Log, Referrals, Campaign Calendar
3. On each sub-page, add a full-page database (not inline)
4. Add all properties to each database as listed above
5. Set up Relations between databases: Touch Log → Contacts (one contact, many touches), Referrals → Contacts (one contact, many referrals), Referrals → Touch Log (link each referral to the touch that generated it)

Phase 2: Import Your Seeding Data (1–2 hours)

1. Take your clean, segmented contact CSV from the segmentation brief
2. In Notion, on your Contacts database, click the three dots → Import CSV
3. Map the CSV columns to Notion database properties

4. Notion will create one database record per row
5. After import, manually review the first 20 records to confirm mapping is correct
6. Set the Warmth field for your top 30 contacts manually — this is subjective and cannot be automated

Phase 3: Set Up Views for Daily Use (30 minutes)

The database is only useful if you actually open it. Create these four views in your Contacts database:

- **“Super Connectors” view:** Filter by Times Referred ≥ 2 , sorted by Times Referred descending. This shows you your highest-value network contacts at a glance.
 - **“Gone Cold” view:** Filter by Last Touch Date is before 6 months ago AND Warmth is Warm or Hot. These are relationships that need attention.
 - **“Follow Up Today” view:** Filter from Touch Log — Follow Up Needed = true AND Follow Up Date = today. Surfaces what needs action today.
 - **“Homeowners — Local” view:** Filter by Segment = Homeowner AND Location contains [your city/zip]. Your residential community at a glance.
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Connecting the Second Brain to Your Campaign Workflow

The Second Brain becomes powerful when it’s updated in real time during campaign execution. Here is the exact workflow for each campaign:

Before sending: Open the Campaign Calendar database and update the Status to “Scheduled.” Verify that the target audience count in your email platform matches your Contacts database filtered view for that segment.

Within 48 hours of sending: Log the campaign as a single batch entry in the Touch Log: Touch Type = “Campaign email”, Direction = Outbound, Date = send date. This creates the event anchor for all replies that follow.

For every reply received: Add a Touch Log entry: Touch Type = “Reply received”, Direction = Inbound, link to the Contact record, set Signal based on content (Referral Generated, Lead Mentioned, or Positive). If a follow-up is needed, check Follow Up Needed and set Follow Up Date.

For every referral: Add a Referrals database entry immediately. Link to the Contact who sent it and to the Touch Log entry that triggered it. Set Outcome to “Not Yet Followed Up” until the lead is worked.

After 12 months of this workflow, your Super Connectors view will show you exactly which five to ten people in your network are responsible for the majority of inbound referrals. These are the people to take to coffee, to thank personally, to invite to events. The system surfaces what intuition alone cannot track at scale.

Advanced: Connecting Notion to Your Email Platform via Zapier

For teams who want to reduce manual entry, Zapier (zapier.com) can automate the Touch Log entry step. This requires a Zapier account (free tier allows five automated workflows) and basic Zapier setup familiarity.

The automation: When a contact replies to a Mailchimp campaign → Zapier creates a Touch Log entry in Notion with the reply details, linked to the Contact record by email address.

The Zap flow:

- 1. Trigger: Mailchimp → New Campaign Reply (or Gmail → New Email matching campaign reply-to address)
- 2. Action 1: Notion → Find Database Item (search Contacts database for the reply’s email address)
- 3. Action 2: Notion → Create Database Item in Touch Log (populate fields from the Mailchimp reply data and the Contact ID found in Action 1)

This automation removes the manual step of logging each reply. It does not remove the step of reviewing replies and adding qualitative Signal and Notes — that still requires human judgment.

Zapier setup documentation: zapier.com/apps/mailchimp/integrations/notion and zapier.com/apps/gmail/integrations/notion.

Notion Pricing for This Use Case

Scenario	Plan Needed	Cost
Solo owner managing the database alone	Free	\$0/month
Owner + office manager (2 users)	Free (up to 5 collaborators on free plan)	\$0/month
Owner + office manager + 3 others	Free (up to 5 still covered)	\$0/month
6 or more users	Plus plan	\$10/user/month

For most restoration companies running this system, the free tier is sufficient indefinitely. The system described here does not require Notion AI, advanced automations, or enterprise features.
