

12-Month Restoration CRM Outreach Calendar & Touch Plan

The hiring email works. The vendor ask works. The educational resource works. The problem is that none of them happen consistently unless they're on a calendar with an owner, a template, and a send date.

This article is the hub of the entire CRM Community Framework — the piece that turns a good idea into a running system. Everything in the strategy described in [Your CRM Is Not a Lead Database](#) lives or dies by whether it gets scheduled.

What follows is a full 12-month outreach calendar for a restoration company, built around legitimate business triggers. Every touch has a reason that isn't "we want to sell you something." Every touch reinforces that your company is active, professional, and thinks of its network as more than a lead source.

The Architecture: Four Touch Types Across Twelve Months

Operations kit — what it is

Claude skills that turn field chaos into repeatable runs.

Field SOPs

Checklists that survive the van

Owner prompts

Decisions without reinventing

KPI rhythm

See the week before it slips

Four touch types across twelve months.

A sustainable touch cadence has four types of emails distributed across the year. Too many of one type and it starts to feel like a newsletter you never asked for. The right mix keeps the relationship varied, human, and genuinely useful.

Type 1: Operational Ask (2x per year)

A real business need: hiring, vendor search, supplier sourcing. These are your highest-engagement emails because recipients can actually help you with something concrete. They feel useful to the sender. Covered in detail in the [hiring email guide](#) and the [vendor ask guide](#).

Type 2: Educational Resource (2x per year)

A genuinely useful piece of content — a seasonal maintenance checklist, a guide to what to do in the first 24 hours after a pipe burst, a “what your insurance actually covers” plain-language explainer. No CTA beyond “thought you’d find this useful.” The goal is to be the trusted expert in their inbox, not the company asking for something.

Type 3: Company Milestone or Update (1x per year)

An anniversary, a new certification, a new service area, an award or recognition. Framed around what it means for the people in your network — not as a press release. “We just hit five years and I wanted to thank the people who’ve trusted us with their homes and their claims.” This is the most relationship-dense email of the year and the one most restoration companies never send.

Type 4: Seasonal Safety or Storm Alert (1x per year)

Before major storm season, freeze season, or wildfire season depending on your geography, a brief heads-up email positions you as the local expert who thinks about their community’s safety. No pitch. Just: “Freeze season is coming — here are three things to check in your home before temps drop.” A link to a longer blog post if they want more detail. Short, local, relevant.

The 12-Month Calendar Template

Adapt the timing based on your region and business cycle. The example below assumes a general U.S. market with standard restoration seasonality (storms in spring/summer, freeze in winter). Adjust as needed.

January: Seasonal Safety Email

Type: Type 4 — Seasonal Safety

Audience: Full database

Trigger: Winter freeze season

Content: “Three things to check before a hard freeze” — pipes, outdoor faucets, HVAC filters, sump pump. Link to a full blog post if you have one. 150 words max.

Why it works: January is a low-activity month for most homeowners. A helpful, non-promotional email from a company they already trust is genuinely welcome.

March: Hiring Email (if applicable) OR Vendor Ask

Type: Type 1 — Operational Ask

Audience: Three segments (homeowners, industry, trade)

Trigger: Spring hiring cycle begins, or sourcing subs for storm season

Content: Use the templates from the hiring or vendor guides. If you’re not hiring, a specialty sub search ahead of storm season is always relevant in Q1/Q2.

Why it works: Spring is when most restoration companies start ramping for busy season — hiring and vendor sourcing at this time is authentic and expected.

May or June: Educational Resource

Type: Type 2 — Educational Resource

Audience: Homeowners only

Trigger: Pre-storm season

Content: “Your storm prep checklist for [your region]” — gutters, roof, trees near the house, emergency kit, insurance policy review. One page. No CTA other than “save this somewhere useful.”

Why it works: This email will be forwarded. Homeowners share safety resources with neighbors and family. It’s one of the highest organic-reach emails you’ll send all year.

August or September: Company Milestone Email

Type: Type 3 — Company Update

Audience: Full database

Trigger: Company anniversary, new certification (IICRC, RIA), new service area, or team growth milestone

Content: Short, personal note from the owner. Thank the people who’ve been part of the journey. Mention what’s new. No ask. Just appreciation.

Why it works: Late summer is a natural “back to business” moment. A warm, human email from a company you’ve worked with is a pleasant interruption in a busy inbox.

October or November: Hiring OR Vendor Ask (second round)

Type: Type 1 — Operational Ask

Audience: Three segments

Trigger: Pre-winter hiring, or sourcing vendors for year-end projects

Content: Second operational ask of the year. If you hired in March, this is a different position or a referral partner ask. Vary the type so it doesn’t feel like a pattern.

Why it works: Fall is another natural hiring window. And year-end is when restoration companies start planning vendor relationships for the coming season.

December: Educational Resource (Optional)

Type: Type 2 — Educational Resource

Audience: Homeowners

Trigger: Holiday season, travel, and winter property risks

Content: “What to check before you leave for the holidays” — water shutoff, thermostat settings, emergency contacts. Optional — if you already sent a freeze checklist in January, this may feel redundant. Only send if the content is genuinely different and useful.

Why it works: December holiday homeowner emails have strong open rates because they’re immediately relevant to something the homeowner is actively thinking about.

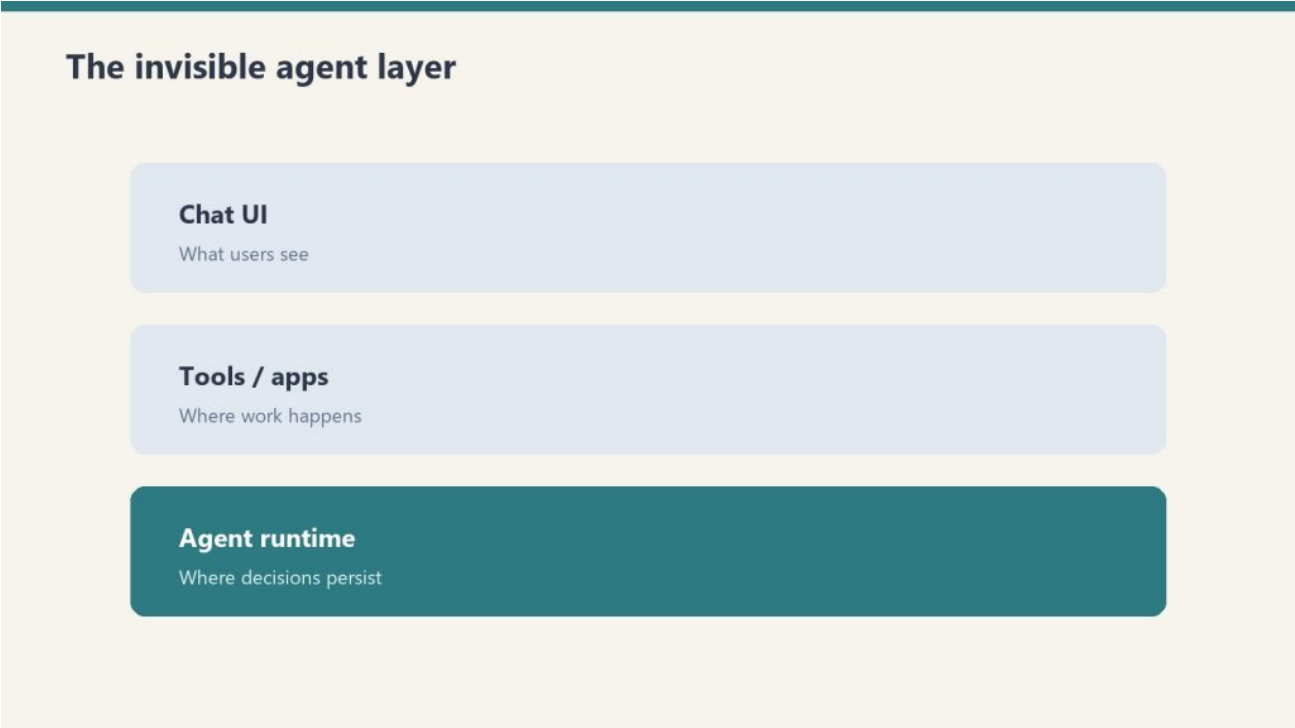
The Minimum Viable Calendar: If You Do Nothing Else

If the full six-touch calendar feels like too much to start, here is the two-email annual minimum that will still meaningfully move the needle:

1. **March or April:** One operational ask (hiring or vendor). Three segments. Uses the templates from the other guides in this series.
2. **June or July:** One educational resource (storm prep checklist). Homeowners only. No CTA.

Two emails per year to a warm local database of 400–800 contacts will reach more people with a higher quality impression than \$2,000 spent on Facebook ads to a cold audience. The bar is genuinely that low — because almost nobody in the restoration industry is doing this at all.

The Technical Setup: Building the Calendar in Notion



Building the calendar in Notion.

The Notion free tier (available at notion.com — free for individuals and small teams) is sufficient for this system. You need one database with the following properties:

Property	Type	Purpose
Email Name	Title	What this touch is called
Send Date	Date	Scheduled send date
Touch Type	Select	Operational Ask / Educational / Milestone / Seasonal Safety
Audience	Select	Full Database / Homeowners / Industry / Trade
Platform	Select	Mailchimp / Brevo / CRM / Direct
Status	Select	Planned / Draft Ready / Scheduled / Sent
Template Link	URL	Link to the draft in Mailchimp or the Notion doc with the copy
Results	Text	Open rate, replies received, referrals generated

Create a calendar view of this database filtered to the current month. Every Monday, glance at it. If something is sending in the next two weeks and isn’t in “Draft Ready” status, that’s your action item for the week.

Set the following Notion reminders on each row: 14 days before send date (“write/review draft”), 3 days before send date (“schedule in email platform”), 1 day after send date (“log results”).

Connecting the Calendar to Your Email Platform

For Mailchimp Users

Build a campaign for each email in advance using Mailchimp’s campaign drafts feature. Give each draft a name that matches the Notion database row (e.g., “March 2026 — Hiring Email — Homeowners”). When the draft is ready, link it in the Template Link field of your Notion row. Schedule it in Mailchimp 3 days before your intended send date so you have time to make last-minute adjustments. After sending, pull the open rate and reply count from Mailchimp’s Reports tab and log them in the Results field in Notion.

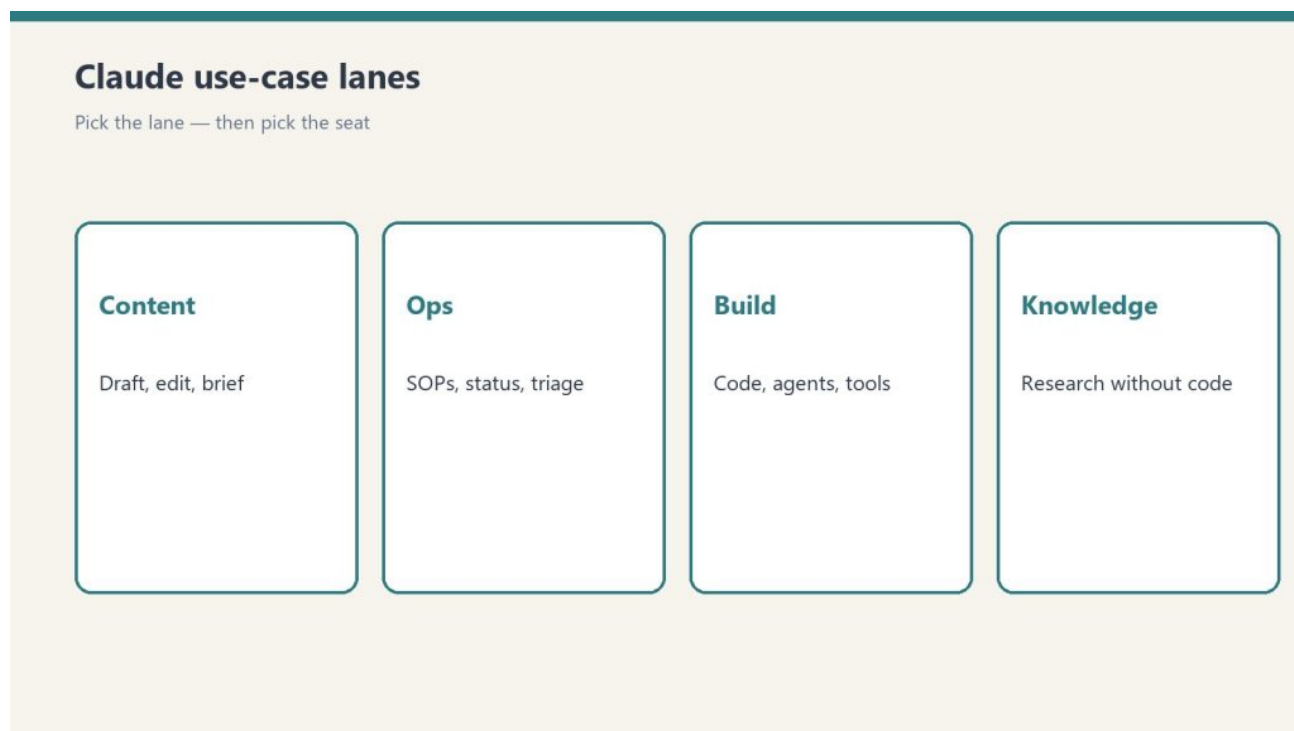
For Brevo Users

Brevo’s Campaigns section works the same way — drafts can be built in advance and scheduled. Brevo’s analytics are straightforward: open rate, click rate, unsubscribes. Log these in Notion after each send.

For CRM-Native Email (Jobber or ServiceTitan)

Neither platform has robust campaign scheduling, so the process is more manual. Build the email copy in Notion, then on the scheduled send date, copy it into your CRM’s email function and send manually. Log results in Notion immediately after.

Using Claude to Maintain the Calendar Year Over Year



Using Claude to maintain the calendar year over year.

After your first year running this system, you'll have a Notion database with six email records, each containing the copy, the results, and the audience. In year two, you don't start from scratch — you improve what worked and adjust what didn't.

Here's a prompt you can use at the start of each year to refresh your calendar with Claude:

"I run a restoration company in [city] and I send 4–6 emails per year to my CRM database to stay top of mind. Here are the emails I sent last year and their results: [paste Notion export]. Based on these results and the current time of year ([month]), help me plan this year's calendar. Suggest which touch types to repeat, which to update, and any new ones that might be relevant given [any business changes — new service area, new certifications, team growth, etc.]. Keep the total to 4–6 sends."

This is the compound interest of the system — each year's data makes next year's calendar smarter and more targeted.

The Results You Should Expect

Realistic benchmarks for a warm local restoration CRM database of 300–800 contacts:

- **Open rate:** 30–45% for operational asks and seasonal safety emails; 25–35% for educational resources; 40–55% for the company milestone email (people open personal notes)
- **Reply rate:** 2–8% on operational asks (higher for the hiring email in our experience); under 1% on educational content (they read, they don't reply)
- **Referral rate:** 0.5–2% per operational ask email (so 2–16 referrals per campaign for a 800-contact list)
- **Lead mentions in replies:** Expect 1–4 per operational ask campaign from homeowners who mention a neighbor or family member who “just had something happen”

These numbers are modest. The cumulative effect across 4–6 touches per year is not. A company that consistently runs this system for three years has touched every warm contact in their database 12–18 times with relevant, human, non-salesy content. That is a referral pipeline that no Google Ads campaign can build.

Frequently Asked Questions

How do I know if I'm emailing too much?

Watch your unsubscribe rate. For a warm local database, a healthy unsubscribe rate is under 1% per campaign. If you're consistently seeing 2–3%+ unsubscribes, reduce frequency or audit whether your content is genuinely useful vs. promotional.

Should every touch include an offer or discount?

No. This is the most important rule of the system. The moment your CRM emails start offering 10% off water damage mitigation, you've converted them from relationship touches into promotional emails. Your contacts will start treating them as such — lower open rates, more unsubscribes, zero referrals. Keep the strategy clean: no promotions, no CTAs, no discounts. Just presence.

What if we miss a planned send date?

Send it anyway, or skip it and move to the next one. A late educational resource is still useful. A late hiring email is no longer authentic if you've already filled the position. Use your judgment — the goal is

consistency over perfection, and six emails per year gives you enough margin that a missed one doesn't break the system.

Can we automate any of this?

The scheduling and platform side can be automated — Mailchimp sequences can be set to send automatically on a schedule. The content should not be fully automated. Each touch should have a human review before it goes out, especially the operational asks and the milestone email. The value of this system comes from its authenticity. Automation can help with logistics; it cannot replace judgment.
