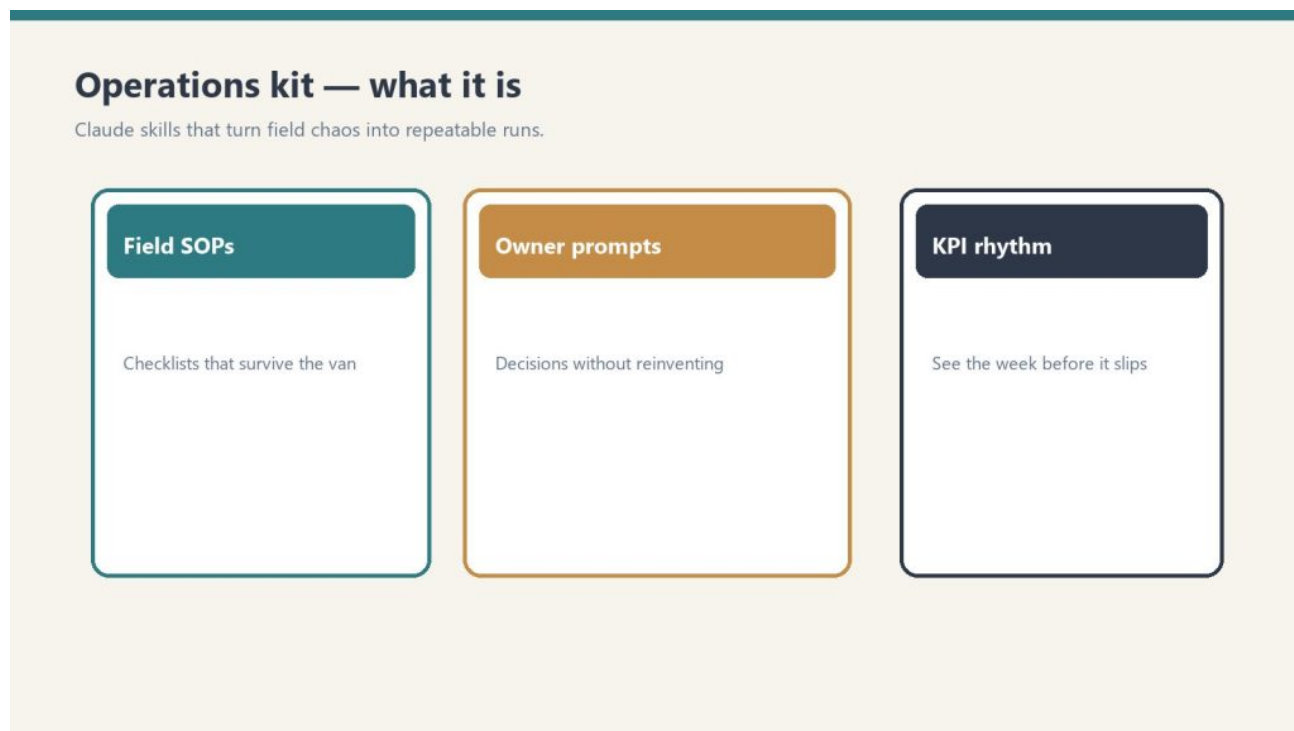


Restoration Email Automation: Mailchimp & Brevo Setup

Who this is for: The person setting up your email system — your office manager, your IT contact, or a freelance marketing person you’ve brought in. This brief assumes basic comfort with web-based software (setting up accounts, uploading files, clicking through settings). No coding required. The strategy behind this system is in [Your CRM Is Not a Lead Database](#) and the full 12-month calendar is in [The 12-Month CRM Touch Calendar](#).

What We’re Building



What we're building.

A four-to-six email annual touch sequence for three audience segments (homeowners, industry contacts, trade contacts), running through a standard email marketing platform, triggered on a predetermined calendar, and tracked in a simple Notion or spreadsheet log.

The system requires no custom development. It uses off-the-shelf software that any non-technical person can configure in an afternoon. Total ongoing maintenance time after setup: approximately one hour per campaign, four to six times per year.

Platform Selection: Mailchimp vs. Brevo for Restoration Companies

Both platforms are appropriate for this use case. Choose based on your database size and send frequency:

Choose Mailchimp if: Your database is under 1,500 contacts, you want the most widely documented platform (easiest to find help online), and you're comfortable paying \$13–\$30/month. Mailchimp's Essentials plan is sufficient — you do not need Standard or Premium for this use case.

Choose Brevo if: Your database is over 1,500 contacts, you only send 4–6 times per year and want to avoid paying for contacts you rarely email, or you want built-in transactional email for other automations. Brevo's Starter plan is \$9/month with no contact storage limits — you pay based on emails sent, not contacts stored. For a 2,000-contact database sending 6 campaigns per year, Brevo costs significantly less than Mailchimp.

The setup instructions below cover both platforms in parallel. Follow the path that matches your platform choice.

Step 1: Account Setup and List Import



Step 1 — account setup and list import.

Complete the database segmentation build from [the CRM segmentation technical brief](#) before starting this step. You should have three clean CSV files: Homeowners, Industry, and Trade.

Mailchimp Setup

1. Create account at mailchimp.com. Select Essentials plan. Enter billing info.
2. Go to Audience → Manage Audience → Add a Field. Add two custom merge fields: JOB_TYPE (text) and SEGMENT (text). These allow personalization tokens in email copy.
3. Go to Audience → Manage Audience → Import Contacts. Upload each CSV file separately, assigning a tag during each import: “Homeowner”, “Industry”, “Trade”.
4. Map CSV columns to Mailchimp fields: First Name → FNAME, Last Name → LNAME, Email → EMAIL, Job Type → JOB_TYPE, Segment → SEGMENT.
5. After import, verify contact counts match your spreadsheet totals. A mismatch usually means invalid email format in some rows — check the import error log.

Brevo Setup

1. Create account at brevo.com. Select Starter plan (\$9/month).
 2. Go to Contacts → Lists → Create a List. Create three lists: “Homeowners”, “Industry Contacts”, “Trade Contacts”.
 3. Go to Contacts → Import Contacts. Upload each CSV, assign to the corresponding list.
 4. Map fields: First Name → FIRSTNAME, Last Name → LASTNAME, Email → EMAIL. Create custom attributes for JOB_TYPE if needed.
 5. Verify counts after import.
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Step 2: Sender Domain Authentication (Critical for Deliverability)

This is the step most people skip and then wonder why their emails land in spam. Both Mailchimp and Brevo require domain authentication to ensure your emails are delivered to inboxes rather than spam folders. This step requires access to your domain’s DNS settings (usually managed through your domain registrar — GoDaddy, Namecheap, Google Domains, or similar).

What Authentication Does

SPF, DKIM, and DMARC records tell receiving mail servers that your email marketing platform is authorized to send email on behalf of your domain. Without them, major providers (Gmail, Outlook, Yahoo) increasingly route your emails to spam or refuse delivery entirely.

Mailchimp Domain Authentication

1. In Mailchimp, go to Account → Settings → Domains → Add and Verify Domain
2. Enter your company domain (e.g., yourcompany.com)
3. Mailchimp will provide you with specific DNS records to add: a CNAME record for DKIM and a TXT record for verification
4. Log into your domain registrar and add these records exactly as shown. Allow 24–48 hours for DNS propagation.
5. Return to Mailchimp and click “Authenticate Domain” once DNS has propagated. A green checkmark confirms success.

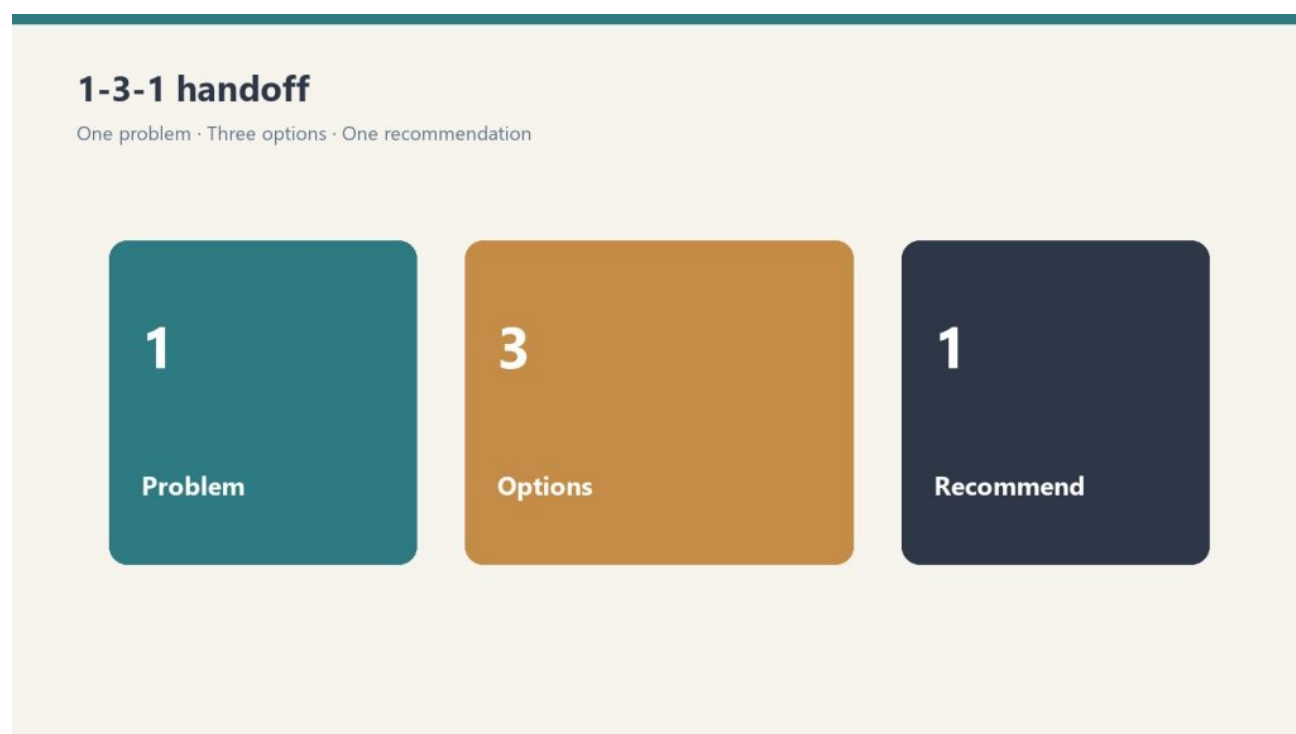
Brevo Domain Authentication

1. Go to Settings → Senders & IP → Domains → Add a Domain

2. Enter your domain and follow the same process — Brevo provides specific DNS records for SPF and DKIM
3. Add records at your domain registrar. Verify in Brevo after propagation.

If your company uses a shared hosting email (e.g., yourbusiness@gmail.com rather than yourbusiness@yourcompany.com), you cannot authenticate a shared domain. In this case, create a free Google Workspace account at \$6/month to get a branded email address before proceeding. Sending from info@yourcompany.com vs. yourcompany@gmail.com meaningfully affects both deliverability and perceived professionalism.

Step 3: Build the Campaign Templates



Step 3 — build the campaign templates.

For the CRM community touch strategy, plain text emails outperform designed HTML templates. Research on warm, relationship-based email consistently shows that recipients perceive plain text as more personal and authentic. The goal is an email that looks like it came from a person, not a marketing department.

Mailchimp Plain Text Campaign

1. Go to Campaigns → Create Campaign → Email
2. Select “Plain Text” as the campaign type (not the drag-and-drop builder)
3. Write your email copy in the plain text field
4. Use Mailchimp merge tags for personalization: * | FNAME | * for first name, * | JOB_TYPE | * for the custom job type field
5. Example: “Hi *|FNAME|*, It’s [Owner Name] from [Company]. We worked with you on your *|JOB_TYPE|* job a while back...”
6. Set up subject line, preview text, from name (use owner’s first name, e.g., “Mike from Acme Restoration”), and from email address (owner’s direct email preferred over info@ for homeowner segment)

Brevo Plain Text Campaign

1. Go to Campaigns → Email Campaigns → Create an Email Campaign
2. Choose “Plain Text” from the template selection
3. Use Brevo’s personalization tokens: {{ contact.FIRSTNAME }}, {{ contact.JOB_TYPE }}
4. Configure sender name and address as above

Build all six campaigns for the year in draft mode before publishing any of them. Label each draft clearly: “Q1-2026-Homeowners-Hiring”, “Q2-2026-Homeowners-Storm-Prep”, etc. This allows you to see the full year’s campaign lineup at once and catch any overlap or redundancy before it goes out.

Step 4: Schedule the Campaign Calendar

Mailchimp Scheduling

1. Open each draft campaign
2. In the Campaign Builder, go to the Schedule step
3. Select “Schedule” and set the date and time. Use the send time optimization feature if available on your plan — it will automatically send to each contact at the time they’re most likely to open based on historical behavior.
4. For your first campaign (no historical data), use Tuesday or Wednesday at 9:30am local time as a default

Brevo Scheduling

1. In the campaign builder, select “Schedule” on the final step
2. Set date, time, and timezone
3. Brevo’s Send Time Optimization is available on paid plans and functions similarly to Mailchimp’s

Schedule all three segment versions of each campaign within the same 2-hour window on the same day — homeowners first, then industry, then trade — staggered by 30 minutes. This prevents simultaneous reply volume from overwhelming a single inbox.

Step 5: Build the Results Tracking System in Notion

Both platforms provide analytics (open rate, click rate, unsubscribes) automatically. The tracking that neither platform does is the qualitative signal — replies, referrals, leads mentioned, and relationship warmth indicators. That layer goes in Notion.

Setting Up Notion (Free Tier)

1. Go to notion.com and create a free account
2. Create a new page called “CRM Touch Calendar”
3. Add a database (table view) with the following properties:

Property	Type
Campaign Name	Title
Send Date	Date
Segment	Select (Homeowners / Industry / Trade / All)
Touch Type	Select (Operational Ask / Educational / Milestone / Seasonal)
Platform	Select (Mailchimp / Brevo / CRM)
Status	Select (Planned / Draft Ready / Scheduled / Sent)
Open Rate	Number (percent)
Reply Count	Number
Referrals Generated	Number
Leads Mentioned	Number
Notes	Text (for qualitative observations)

1. Add all six planned campaigns for the year as rows in the database

2. Set the Status to “Planned” for all. Update to “Draft Ready”, “Scheduled”, and “Sent” as you progress
3. After each campaign sends, log the open rate from your email platform and manually count and log reply count, referrals, and lead mentions from your email inbox

The Notion database becomes your campaign intelligence layer. After two or three years of data, you’ll have clear evidence of which touch types generate the highest referral rates, which segments are most engaged, and which subject lines perform best for your specific audience.

Step 6: Set Up Reply Management

For the homeowner and industry segments, replies to hiring emails and vendor asks often include lead mentions (“actually, our neighbor just had water get in last week”). These need to route to whoever handles incoming leads immediately, not sit in an inbox until someone reviews the campaign results.

The simplest solution: create a dedicated email address (campaigns@yourcompany.com or outreach@yourcompany.com) as the reply-to address for all campaigns. Set up a simple email rule that forwards any reply mentioning keywords like “water”, “damage”, “claim”, “flooded”, “burst”, or “insurance” to your main dispatch email address.

In Gmail, set this up under Settings → Filters and Blocked Addresses → Create a new filter. In Outlook, use Rules → Create a New Rule. Set the trigger to “subject or body contains” and the action to “forward to [dispatch email]”. This catches the accidental leads without requiring manual review of every reply.

Cost Summary

Item	One-Time	Monthly	Annual
Mailchimp Essentials (500 contacts)	\$0	\$13	\$156
Mailchimp Essentials (1,000 contacts)	\$0	\$20	\$240
Brevo Starter (unlimited contacts)	\$0	\$9	\$108
Google Workspace (if needed for branded email)	\$0	\$6	\$72
Notion free tier	\$0	\$0	\$0
Email validation (one-time list clean)	\$5–\$15	\$0	\$0

Total annual cost for a fully operational system: \$108–\$312 depending on platform choice and contact volume. This covers 4–6 campaigns per year to a warm, segmented local database of up to 2,000 contacts.
