

HOW TO USE YOUR CRM DATA **FOR RESALES**



Six ideas on how to use the roaster information you already have to improve retention, sell more to the same buyers and make cold leads warm again.

Algrano gives you a lot of data about the roasters who bought from you and those who ordered a sample in the past. Exploring this information helps you prepare an outreach plan, so you start a new season on the right foot.

Loyalty is where direct trade really pays off

The biggest value in using the platform is getting recurring buyers. It's always easier to convert a roaster for the second time than it is the first one.

The producers and exporters with best retention on Algrano are the ones who actively talk to roasters. Some relationships

are so solid that we don't even receive samples anymore. This doesn't happen every time, but it can become the norm if you and Algrano work together.

This is why we're sharing a few ideas on how to make the most of your CRM data.



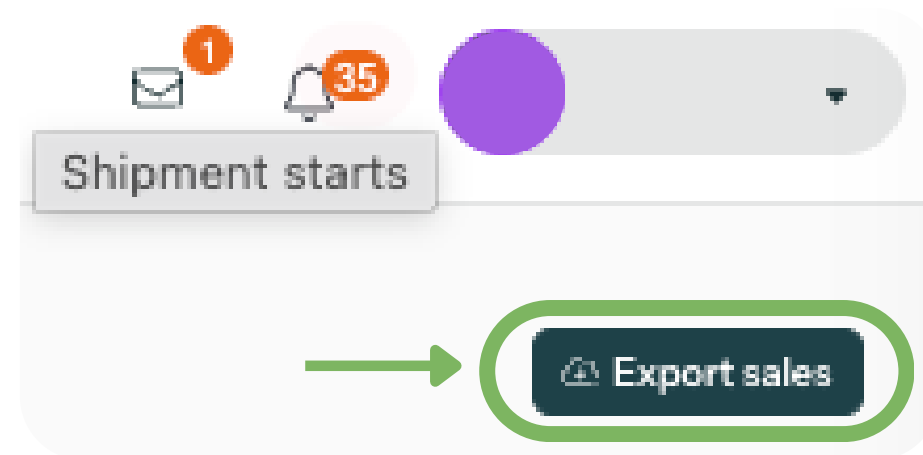
What your CRM tells you

Your CRM has a wealth of information about customers and leads that you can use to plan your offers, calculate costs, prioritise roaster outreach, engage hot leads and more. With the CRM, you can answer questions like:

- Who are my big buyers?
- Who are my loyal roasters?
- What's my average order volume?
- Did I lose any important customers last year?
- Do the roasters always buy the same coffees?
- Do they only buy one coffee or multiple?
- Did the roaster already order a sample (when samples are listed)?
- Who said they were interested in a coffee but didn't buy it?

Export your sales data

Here's what we recommend you do next time you open your dashboard. To get started, export your sales data. The tables on your CRM can't be edited, so the easiest way to extract information from your account is to export your sales as a CSV file and upload it to a spreadsheet, where you can sort and filter columns.



Priority buyers: pre-contracting, diversification and diff offers

After exporting your sales, it's easy to see who your bigger buyers are. Just organise the sheet sorting the volume column from high to low.

These are your first priority buyers, and all of them should receive a personal message, if they haven't yet.

If a roaster bought anything above 100 bags from one of your public offers, he/she should be contacted early in the sales cycle, even before samples are available, as they are more likely to pre-contract.

If a roaster bought a full container, they might be open to offers in differentials. Our team can help with that.

If you price your public offers with smaller order volumes in mind, as you don't know what the final volume will be, these roasters are good candidates for a private offer at a better price. Roasters like this are also good candidates for diversification, so you can prepare exclusive offers for them.





LOYAL BUYERS:

explore new coffees and grow together

Roasters who have bought from you many years, even if they're not big, also deserve special attention. We have seen many roasters start small and grow in partnership with producers. These tend to be the strongest relationships we have in the books.

If a roaster buys more than one coffee from you, test other lots you haven't offered on the marketplace yet. There's potential to upsell or to sense-check demand for new processing methods you're experimenting with.

Roasters who know your menu well are also a great source of feedback, as they can compare coffees and tell you how their customers react to different flavour profiles.

SANITY-CHECK YOUR INVENTORY

Analyzing which coffees are selling helps to sanity-check your inventory. Do you have any coffee that used to perform well and saw a drop in sales? Something might be off.

Algrano can provide you with an overview of how the quality of your coffees has been accessed over time. If the profile of a coffee changes, roasters might migrate to another lot or switch to another producer. We can help you dig deeper and understand what's behind that.

CHECK IF YOUR BUYERS ORDERED NEW SAMPLES

When you have coffees listed, check your **Sample Orders tab** at least once a week. Every customer gets an email when a coffee they bought last year is available again. All roasters also receive a biweekly newsletter with a list of all the new coffees on the marketplace.

If your buyers haven't ordered a sample within 2 weeks of the listing, they might benefit from a nudge from you. Send a message with the link to the new offer, referencing their previous purchase and asking if they're interested in getting the same coffee again.

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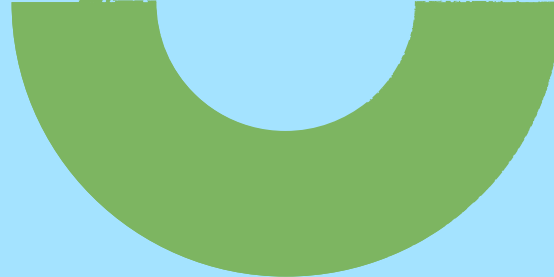
Sample orders

Select an option... Select an option... elect an option... Select an option...

Sample orders: 1044 Roasters: 425 Shipped: 1044 Match: 113

HARVEST	ROASTER	ROASTER COUNTRY	ORDERED DATE	STATUS	
	 View relationship		August 13, 2026	Shipped	View details Get in touch
	 View relationship		August 13, 2026	Shipped	View details Get in touch
	 View relationship		August 12, 2026	Shipped	View details Get in touch
	 View relationship		August 12, 2026	Shipped	View details Get in touch
	 View relationship		August 12, 2026	Shipped	View details Get in touch
	 View relationship		August 12, 2026	Shipped	View details Get in touch
	 View relationship		August 12, 2026	Shipped	View details Get in touch
	 View relationship		August 10, 2026	Shipped	View details Get in touch
	 View relationship		August 07, 2026	Shipped	View details Get in touch
	 View relationship		August 06, 2026	Ordered	View details Get in touch
	 View relationship		July 22, 2026	Shipped	View details Get in touch

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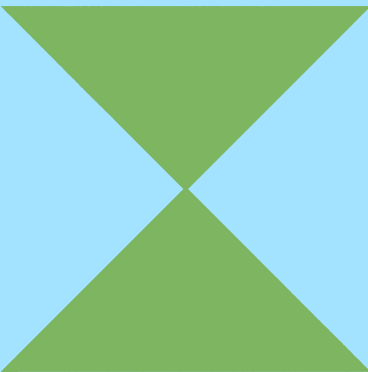


REENGAGE LOST BUYERS WITH NEW SAMPLES

Having samples available gives you the opportunity to reengage roasters who stopped buying, talking about why now it's a good time to try a new sample.

You'll need a hook. Maybe the market price is down and they'll get a better price. Maybe the weather has been particularly good and you're very confident about the quality of the coffee.

It's always good to reference what they bought before (in case they don't remember) and provide an update about the harvest. When we need to win-back a roaster, we recommend the same coffee. If that's not available anymore, we recommend a coffee with a similar profile and price point to the one they previously bought.



PREPARE OFFERS FOR LEADS WHO LEFT FEEDBACK

Scan your Sample Orders tab for feedback. The column Status shows who marked the coffee as “match” and “no match”.

A roaster who marked a sample as a “**match**” is always easier to reengage. Those who marked a sample as “**no match**” might also be more engaged and responsive, because they take the time to give feedback.

Shipped	View details	Get in touch
No match	View details	Get in touch

Harvest	
Roaster	
Ordered date	June 15, 2026
Status	No match
Review	the sensory profile is not what I'm looking for

Before writing to them, check why the coffee was not a match. Click on the “**View Details**” button to see the reason why a roaster was not interested in the coffee. This is relevant information to pick up a conversation with a potential new buyer.