

Llama CRM

Overview and User Guide

Reality Labs & AI Partnerships
v2025.04.01



01 Context

02 What is built for the Llama MVP

03 Feedback & Feature Requests

What have we built?



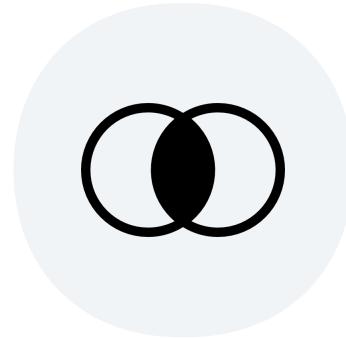
We have built a Customer Relationship Management (CRM) solution in Salesforce to **help RL & AI Partnerships teams manage relationships and interactions with partners** with LlamaX being the first MVP use case

Why do we need a **CRM for RL & AI Partnerships** (and LlamaX in particular)?



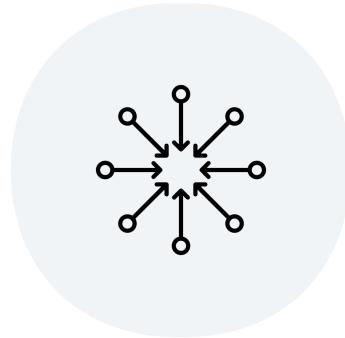
More Partners

Since taking on AI, RLP's portfolio has grown from managing dozens of partners to hundreds



More Complexity

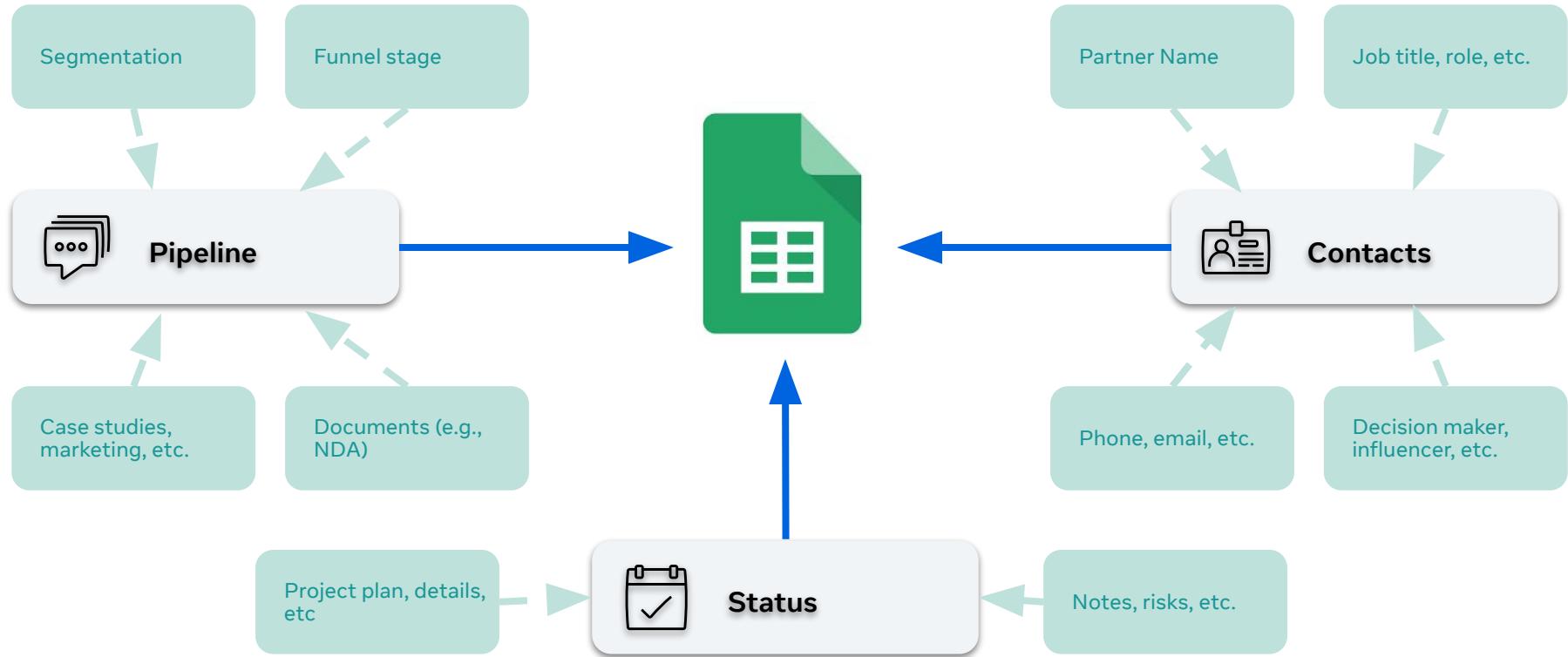
With the emergence of AI, there are now multiple touch points with a single partner across multiple teams



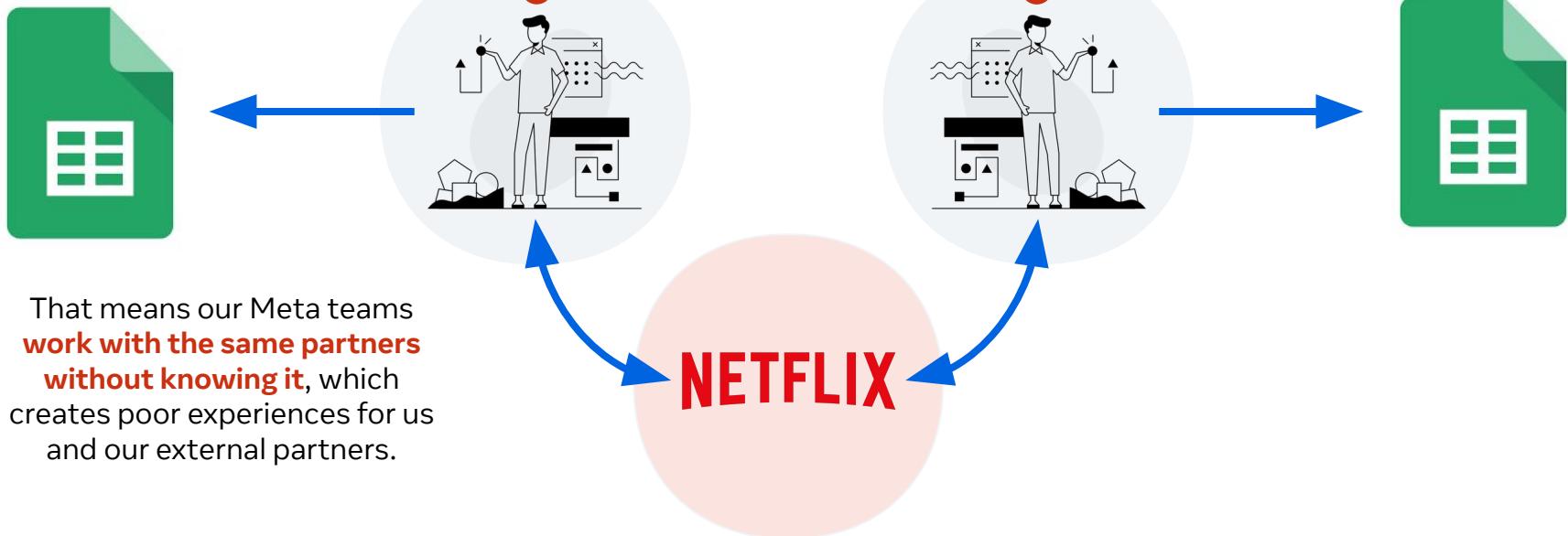
More Alignment

An increase in various gSheet trackers has made it difficult to align around a single-source-of-truth

LlamaX GTM teams **currently use an ever-evolving Google Sheet** to track and manage partner information.



Unfortunately, these spreadsheets are **not standardized or connected** to other Meta teams.





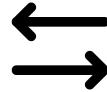
Manage partner set

Managed Partner Set (MPS)

- Tag SPM/BD to partner
- Update existing partners
- Offboard inactive partners

Partner contacts

- Tag internal stakeholders
- Upload external contacts



Track partner interactions

Meetings and interactions

- Add and edit key partner meetings and interactions

Historical timeline

- Easily see timeline of all partner engagement



Monitor partner deals & initiatives

Track progress

- Maintain updates and status of ongoing work

Add collateral

- Link-out to gDocs and add reference types (e.g., case studies, use cases)

Key terms you'll see in Salesforce (SF)



Account

Can be either a Channel Partner, Partner, or Customer



Opportunity

An engagement with a Partner, tracked through various stages



Implementation

A technical deployment of the opportunity



Either a Customer or a Channel Partner



An engagement with the Customer

Translations, recommendation systems

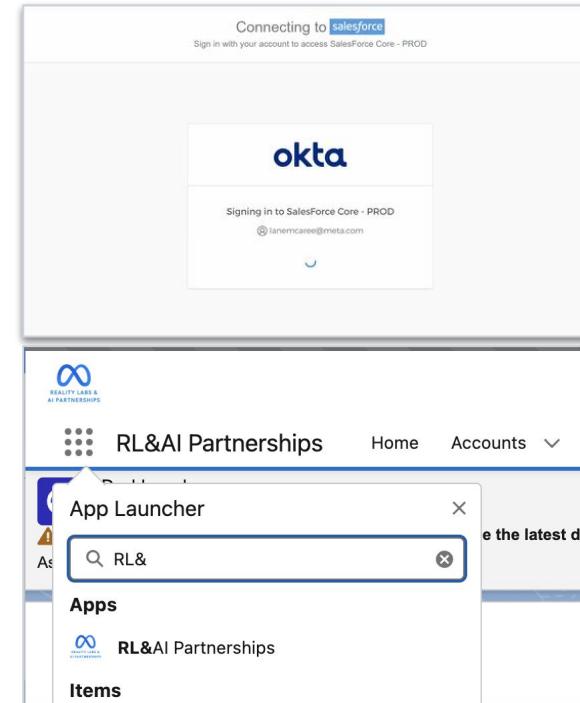
PR process starting from POC to production

TBD, at Scope POC stage

Salesforce login

Takeaway | Salesforce RL & AI Partnerships Salesforce “app” can be accessed through <https://fb.my.salesforce.com/> and uses our SSO

- 1 Click [here](#) to login.
- 2 You will be automatically logged in using Single Sign On (SSO) with your enterprise credentials.
- 3 From the drop-down app menu at the upper-right corner, select “App Launcher.”
- 4 Search for and click the tile “RL&AI Partnerships”
- 5 You’ll be taken to the Home Page where there is a dashboard. Now you’re in!



Navigation overview

Takeaway | Google-like search to find Accounts and Opportunities (although list view is better); rest of nav is self explanatory



Fundamentals: UX and Navigation

Accounts and Account Teams

Opportunities and Implementations

Global Search: A built-in search engine in Salesforce, similar to Google. It allows you to find accounts, opportunities, and more with fuzzy matches

TIPS:
Use "List View" instead of Global Search to distinguish between multiple records with the same name (see [next slide](#))

The screenshot shows the top navigation bar of a Salesforce instance for 'RL&AI Partnerships'. The bar includes a logo, a search bar ('Search...'), and various navigation links: Home, Accounts, Opportunities, Reports, Dashboards, and Tasks. To the right of the search bar are icons for favorites, new record, map, help, and notifications. Below the bar, the 'Accounts' header is expanded, showing a list of recent records including 'Visa Inc', 'Accenture plc (Ultimate Parent)', 'Capital One', 'Dell Inc', and 'Unmanaged Partner'. A tooltip indicates that clicking on a header like 'Opportunities' will view a list of related records. Another tooltip suggests using the App Launcher to search for objects like 'Implementation'. A third tooltip shows a dropdown menu for 'Accounts' with options like '+ New Account' and 'Recent records'. A yellow box at the bottom left says 'Click the carrot next to a header to view recently accessed records'. A yellow box at the top right says 'How to use these icons' with two examples: a star icon for adding to favorites and a bell icon for notifications.

App Launcher: you can also use to search for an Object (e.g., Implementation)

Click the carrot next to a header to view recently accessed records

Click on a header (e.g., Opportunities) to view a list of related records.

How to use these icons

Add the record, report, etc. to your Favorites list

This will light up when you have a notification

Fundamentals: UX and Navigation

TIPS:

Customize Your View

- Pin one List view per section (e.g., Account) for easy access.
- Save additional views by:
 - Clicking the star icon in the top right corner
 - Viewing the List View, which adds it to Recently Viewed

Default List Views

- The 3 default list views are the same for all users, except for Private Opportunities, which are only visible to Opportunity Team members, Executives, or StratOps

Help! SF “forgot” the list view I pinned earlier

- This happens after clearing the cache from your browser. Simply re-pin the list again

Our favorite ‘List Views’ to consider pinning

Takeaway | Select from a pre-created list of views: either what is important to YOU vs relevant to all Metamates working on Llama

ACCOUNT

RL & AI Partnerships (Default) → List of all Accounts with at least 1 Llama Opportunity

RL & AI Partnerships (My Accounts) → List of all Accounts where you are a member of the Account Team

OPPORTUNITY

Opportunities
RL & AI Partnerships (Default)

List of all Llama Opportunities
(looks same to all)

Opportunities
RL & AI Partnerships (My Opportunities)

List of all Opportunities where you are a member of the Opportunity Team

IMPLEMENTATION

Implementations
RL & AI Partnerships (Default)

List of all Llama implementations
(looks same to all)

Implementations
RL & AI Partnerships (My Implmnts.)

List of all Implementations where you are either the listed Partner Engineer or Partner Manager

Tasks - use for gDoc links, weekly updates, and more

Takeaway | "Task" can be tied to an Account, Opportunity, or to an Implementation

Tasks (or "Activities") in Salesforce are used to log specific actions related to Accounts, Contacts, Opportunities, and other records for operational tracking.

The screenshot shows the Salesforce Opportunity page for 'Dropbox -LlamaX Lighthouse Account'. At the top right, there is a 'New Task' button, which is highlighted with a red box. In the bottom right corner of the page, there is a side panel titled 'Opportunity Team (1)'. This panel includes a list of team members and a section for 'Activities (1)'. The activity listed is a 'Weekly Update' related to the opportunity. The entire 'Activities' section is also highlighted with a red box.

Click "New Task" to log a task. You can also find this button in the same location on the Account and Implementation pages

Fundamentals: UX and Navigation



Accounts and Account Teams

Opportunities and Implementations

TIPS:

Associate Tasks Correctly: Create Tasks from the most relevant location, e.g.,

- Opportunity: specific use cases or updates on an ongoing deal
- Account: general account plans or meeting notes that should be visible to all

Note: Tasks created in one location won't appear on other pages.

Tasks that have been logged show up on the side panel as an "Activity"

Accounts

Takeaway | View shared, Meta-wide partner (customer) data here; most fields are read-only, except for adding items like NDAs

View Meta-wide key partner information and related details by clicking on the tabs.

The screenshot shows the 'Account' page for 'Visa Inc'. At the top, there's a header with tabs for 'Follow', 'Edit', 'Change Owner', and 'View Account Hierarchy'. Below the header, there are sections for 'FRL Account Name', 'FRL Retail Partner Type', 'Maturity', 'Website', and 'Partner Type'. A red box highlights the navigation tabs: 'Details', 'Teams', 'Opportunities', 'Contacts', and 'Implementations'. The 'Details' tab is selected, showing sections for 'Account Information', 'Account Segmentation', and 'System Information'. Under 'Account Information', fields include 'Account Name' (Visa Inc), 'Legal Entity Name' (VISA INC.), 'Account Owner' (EAMON STENSON), 'Facebook Org ID' (473325142741628), 'Facebook Page URL' (test), 'Link to NDA', 'Account Record Type' (Standard), 'Parent Account', 'Ultimate Parent' (Visa Inc), 'Ultimate Parent?' (checked), 'Country' (United States), 'Count Teams' (24), 'Organizations' (Testing with Team-WhatsApp-Reality Labs & AI-Reality Labs & AI Partnerships), and 'Teams' (Instagram-LlamaX-Llama). Under 'Account Segmentation', fields include 'Industry' (Diversified Financial Services) and 'Partner Account' (checkbox checked). Under 'System Information', fields include 'Created By' (Katy Cafazza, 2/26/2010 1:26 PM), 'Last Modified By' (Pawel Cebulski, 3/20/2025 3:30 AM), and a notes section titled 'Notes & Attachments (3+)' containing three entries: 'Account team update' (May 18, 2022 - Note), 'Account team update' (Mar 24, 2022 - Note), and 'Collector Comment: 2018-03-19 16:34:36Z' (Mar 19, 2018 - Note). A blue box labeled 'TIPS:' contains the text: 'You will not be able to edit Account Information directly, so request support [here](#)'.

Fundamentals:
UX and Navigation

Accounts and
Account Teams

Opportunities and
Implementations



Account teams

Takeaway | Account Teams (aka Teams) help you identify relevant XFN Metamates to connect with for partner support and insights

Fundamentals:
UX and Navigation



Accounts and
Account Teams

Opportunities and
Implementations

View Meta teams assigned to the partner

Account
Visa Inc

FRL Account Name	FRL Retail Partner Type	Maturity	Website	Partner Type
			visa.com	

Details **Teams** Opportunities Contacts Implementations

Apply Filters

Include Inactive

Team Members:

See team members as of: April 1, 2024

Team Type: -Select-

Visa Inc - Advertiser (1)

Visa Inc - Advertiser - C

Sal...	Te...	Ter...	Sta...
1	Chris C...	S...	A...

Visa Inc - GenAI - Reality Labs & AI Par

Visa Inc - Reality Labs & AI Partnerships - Tier 2

Sal...	Te...	Ter...	Sta...
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TIPS:

Add to Account Team in Salesforce: Use the [feedback form](#) to request adding yourself to a new team

Relevant teams you will see in Salesforce:

- Global Accounts Team
- Global Business Group (GBG)
- Business Marketing Group (BMG)
- Agency Team
- App Monetization (App Mon)
- Client Business Group (CBG)
- Workplace Team
- Reality Labs Sales (RL Sales)
- Global Partnerships and Content (GP&C)
- Business and Marketing Partnerships (BMP)
- Gaming Partnerships Team
- Mobile Partnerships Team

How to create an Opportunity (1 of 2)

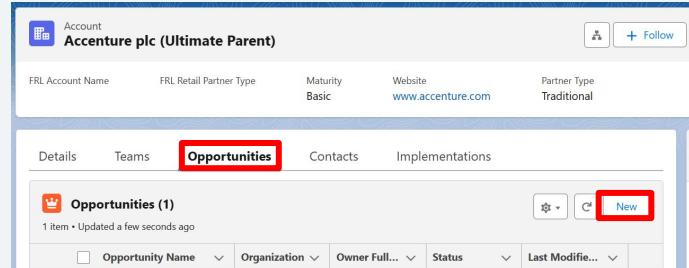
Takeaway | Create opportunities from a customer account, with one opportunity per use case

Fundamentals:
UX and Navigation

Accounts and
Account Teams

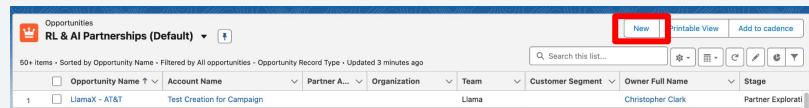
Opportunities and
Implementations

PREFERRED METHOD
Option 1: Go to Customer Account >
Opportunities tab > Click "New"



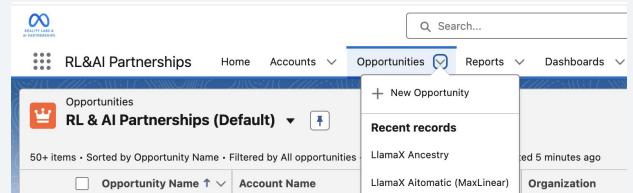
The screenshot shows the 'Opportunities' tab selected in the navigation bar. Below it, a list of opportunities is displayed with a header row showing columns for Opportunity Name, Organization, Owner Full..., Status, and Last Modified. In the top right corner of the list area, there is a red box around the 'New' button.

Option 2: Click "New" from Opportunity
list view



This screenshot shows the same 'Opportunities' list view as the previous one, but with a different account selected. A red box highlights the 'New' button in the top right corner of the list area.

Option 3: Click the Opportunities carrot
in the top navigation bar (will require you
enter the Account)



This screenshot shows the top navigation bar with the 'Opportunities' icon highlighted. A red box highlights the 'New Opportunity' button in the dropdown menu that appears when the icon is clicked.

TIPS:

- Create Opportunity based on **Customer account**, not Channel Partner
- Track each use case as a separate opportunity if they have different decision makers, implementations, or timelines

How to create an Opportunity (2 of 2)

Takeaway | To record an opportunity, fill in three key fields

Fundamentals:
UX and Navigation

Accounts and
Account Teams

Opportunities and
Implementations

There are three required fields record
an opportunity

TIPS:

- Name Opportunities Clearly:** Use "LlamaX - Partner Name Simple Description" for easy identification
- Set Initial Stage:** Start with "Partner Exploration" unless it's a lead, then use "Internal Identification"
- Estimate Close Date:** Set to when you expect kick off production, and update as needed
- Deleting an Opportunity:** Submit a [feedback form](#)

Do not edit these fields.
"Organization" and "Team" will auto-populate after you click Save

New Opportunity

Information

Opportunity Owner: Test RLP Partner Relationships User

* Opportunity Name: LlamaX - Visa Intelligence Testing March

* Stage: Partner Exploration

* Close Date: 5/30/2025

Account Name: Visa Inc

Channel / Direct: Direct

Partner Account: Search Accounts...

Organization

Team

Private

Link to Agreement

Business Impact

Loss Reason: --None--

Lost Reason Details

Cancel Save & New Save

Managing an Opportunity

Takeaway | Manage opportunities by updating stages, tasks, and related info.

The screenshot shows the software's opportunity management interface. At the top, there's a navigation bar with links like Home, Accounts, Opportunities, Reports, Dashboards, and Tasks. Below the navigation is a search bar and some user icons. The main content area displays an opportunity card for "LlamaX - Aitomatic x Tokyo Electron". The card includes fields for Account Name (Aitomatic), Account Legal Name (Aitomatic), Opportunity Owner (Rohith Bhatia), Organization (AI, WhatsApp, and Top Partnerships), and Team (Llama). There are buttons for "New Task", "New Opportunity", and "Edit". A progress bar at the top of the card indicates the stage: Partner Exploration (green), Technical Evaluation, Partner Proposal, Negotiation, and Closed. A button labeled "Mark Stage as Complete" is also present. Below the card, there are sections for "Key Fields" (Use Case Summary and Use Case Details) and "Details" (Information, Organization, Team, Stage, Close Date, Account Name). To the right, there are panels for "Opportunity Team (1)" (Rohith Bhatia, Member Role: Opportunity Owner), "Activities (0)", and "Opportunity Field History (1)". A large bracket on the left groups the "Opportunity Details" and "Opportunity Progression" sections, while another bracket on the right groups the "Related Info" section.

Opportunity Progression
Click the next chevron or
"Mark Stage as Complete"
to progress through
stages.

Opportunity Details
Edit fields by either
clicking the pencil icon
next to each field OR the
"Edit" button at the top
right.

Tasks
Add weekly
updates,
meeting notes,
reminders

Related Info
View team
members,
notes, links,
and change
history.

Opportunity Teams (1 of 3)

Takeaway | Opportunity Teams grant edit access, ease reporting, and give credit to contributors.

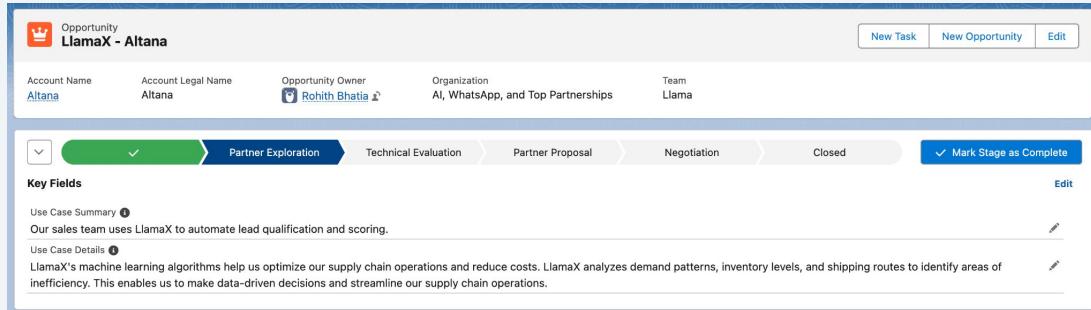
Why Opportunity Teams matter

1. Grants Edit Access: Allows them to make changes.
2. Eases Reporting: Helps individuals track their opportunities.
3. Gives Credit: Recognizes their contributions (future feature).

Fundamentals: UX and Navigation

Accounts and Account Teams

Opportunities and Implementations



TIPS:

tails Related

- The Opportunity Team is a subset of the Account Team, and may include the same individuals.
- The creator is automatically listed as the Opportunity Owner.

Who Should be on an Opportunity Team?

- Internal team members working on the opportunity, such as BD, SPM, CSM, and PE, should be included. Additionally, external partners like channel partners' BD, marketing teams for potential case studies, and relevant XFN teams that originated the opportunity should also be part of the Opportunity Team.



Opportunity team members are not automatically added to an Opportunity. You must manually add them to the opportunity (detailed [next](#))

Opportunity Teams (2 of 3)

Takeaway | Two ways to add Opportunity Team members, automatic is quickest to add core Account Team members

Fundamentals:
UX and Navigation

Accounts and
Account Teams



Opportunities and
Implementations

Opportunities > LlamaX - Altana
Opportunity Team

1 item • Sorted by Last Modified Date • Updated 12 minutes ago

Team Member	Member Role
1 Rohith Bhatia	Opportunity Owner

Add Account Team Add Opportunity Team Members

PREFERRED METHOD

Option 1: Automatic - add entire Account Team with one click
(relevant if entire Account Team is engaged in the Opportunity)

Option 2: Add individually - manually add Metamates to the Opportunity (best when XFN need to be added)

PREFERRED METHOD

Option 1: Automatic

From this view, you can **delete** individuals that are not relevant to this specific engagement (click on carrot on right side)

Opportunities > LlamaX - Altana Opportunity Team	
7 items • Sorted by Last Modified Date • Updated a few seconds ago	
Team Member	Member Role
1 Nehemiah Bishop	Strategic Partner Manager
2 Abhijit Srikanth	Business Development Lead
3 Brett Prescott	Strategic Partner Manager
4 Monireh Ebrahimi	Partner Engineering
5 Rusti Baker	Strategic Partner Manager
6 Andy Forsberg	Strategic Partner Manager
7 Rohith Bhatia	Opportunity Owner

Delete button for that Metamate

Opportunity Teams (3 of 3)

Takeaway | Use this option to add team members not directly assigned to the partner such as XFN teams.

Fundamentals:
UX and Navigation

Accounts and
Account Teams

Opportunities and
Implementations

Option 2: Add individually - this process is best for XFN that may not be tied to Account Team

(1) SEARCH for the name of the person (it will start to autofill)

(2) SELECT the team role (Customer Success Manager, Business Development, etc.)

(3) SELECT the access level - read only or read/write

TIPS:

- All XFN will need to be added through this method to edit Opportunity details

Opportunities > LlamaX – Altana
Opportunity Team

Add Account Team Add Opportunity Team Members

1 item • Sorted by Last Modified Date • Updated 12 minutes ago

	Member Role
Altana	Opportunity Owner

Add Opportunity Team Members

Team members' access level for this opportunity may be greater than your organization's default opportunity access settings.

User	Team Role	Opportunity Access
1		Read Only
2		Read Only
3		Read Only

Add Row Cancel Save

Reality Labs & AI Partnerships | 20

Private Opportunities (uncommon)

Takeaway | Mark an opportunity as "Private" if it's a highly confidential project that only authorized individuals should know about.

The screenshot shows the 'Details' tab of an opportunity card. The 'Information' section includes fields for Opportunity Owner (Corey Featherly), Opportunity Name (LamaX - Accenture), Stage (Partner Exploration), Close Date (3/27/2025), Account Name (Accenture plc (Ultimate Parent)), Channel / Direct (Channel), Partner Account (Accenture plc (Ultimate Parent)), and Description. The 'Team' field shows 'Llama' and has a checkbox next to 'Private' which is checked. A red box highlights this checked checkbox.

In the Details section on the Opportunity page, click on the checkbox next to "Private". Then click Save.

Fundamentals:
UX and Navigation

Accounts and
Account Teams

Opportunities and
Implementations

What happens when you mark an Opportunity as "Private"?

Marking an Opportunity as "Private" controls who can view its details. Here's how it works:

- Default (non-private) opportunities: Any Metamate with Llama CRM access can see the details, but only Opportunity Team members can edit.
- Private opportunities: Only these individuals can view the details
 - Opportunity Owner
 - Opportunity Team members
 - Executives (mostly VP level)
 - StratOps and SF administrators

TIPS:

When evaluating who has access to see the Opportunity, always consider using Opportunity Teams functionality first.

Stages in Opportunities

Takeaway | Each stage aligns with the LlamaX Customer engagement process and is mapped to the now-deprecated [Pipeline Sheet](#).

Internal Identification

Partner Exploration

Technical Evaluation

Partner Proposal

Negotiation

Closed

AKA: Awareness. Internal exploration and prioritization of a partner/customer/channel partner (simplified as partner in these descriptions); also can be considered a Lead or a potential Initiative; at this stage, there has likely been no discussions with the partner.

Internal Identification

Partner Exploration

Technical Evaluation

Partner Proposal

Negotiation

Closed

AKA: Consideration. Exploring the opportunity with the partner through early conversations, without any official commitments from either side.

Technical Evaluation

Partner Proposal

Negotiation

Closed

AKA: Proof of Concept. Evaluating the technical feasibility of the opportunity, including creating a Proof of Concept to test the solution.

Partner Proposal

Negotiation

Closed

[SKIPPED FOR LLAMAX] Creating a proposal and quote for the partner, outlining the scope of work, timeline, and costs in a detailed breakdown.

Negotiation

Closed

Conducting negotiations with the partner to reach a mutually beneficial agreement on terms and conditions.

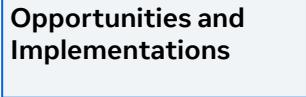
Closed/Won

AKA: Production. Closing the opportunity as won or lost, moving forward with implementation if won, or documenting reasons for loss if lost; at this stage, PE will create an Implementation record to track production progress

Opportunity - Partner Exploration

Takeaway | Complete the "Use Case Summary" and "Use Case Details" fields to progress to the Technical Evaluation stage.

AKA: Consideration. Exploring the opportunity with the partner through early conversations, without any official commitments from either side.



The screenshot shows the Opportunity record for "LlamaX - Aitomatic x Tokyo Electron". The key fields section has two items highlighted with a red border:

- Use Case Summary:** LlamaX's natural language processing capabilities help us extract valuable information from unstructured data.
- Use Case Details:** Our marketing team utilizes LlamaX to generate personalized content and improve campaign engagement. LlamaX's natural language processing capabilities enable us to analyze customer preferences, behavior, and interests. This information is used to create targeted and personalized marketing campaigns that resonate with our customers.

The main details section includes the following data:

Field	Value
Opportunity Owner	Rohith Bhatia
Opportunity Name	LlamaX - Aitomatic x Tokyo Electron
Stage	Partner Exploration
Close Date	5/11/2025
Account Name	Aitomatic
Channel / Direct	Direct
Partner Account	Unmanaged Partner
Organization	AI, WhatsApp, and Top Partnerships
Team	Llama
Private	Private
Link to Agreement	
Business Impact	LlamaX has improved our financial forecasting accuracy by 40%.
Probability (%)	0%
Loss Reason	
Lost Reason Details	

On the right side, there are two panels:

- Opportunity Team (1):** Rohith Bhatia (Member Role: Opportunity Owner)
- Opportunity Field History (1):** Date: 1/12/2025 5:15 AM, Field: Created, User: Chris Clark, Original Value: New Value: View All

TIPS:

- Complete "Use Case Summary" (255 character limit so keep this section a short summary) and "Use Case Details" to progress.
- Edit these fields in either the "Key Fields" or "LlamaX Details" sections.

Opportunity - Technical Evaluation

Takeaway | The PE/SA assigned to the Opportunity should fill in the "Llama Implementation Details" section.

AKA: Proof of Concept. Evaluating the technical feasibility of the opportunity, including creating a Proof of Concept to test the solution.

The screenshot shows the 'Opportunity' screen for 'LlamaX - Capital One'. At the top, there's a navigation bar with 'New Opportunity', 'New Implementation', and 'Edit' buttons. Below the navigation is a progress bar with stages: 'Technical Evaluation' (highlighted in blue), 'Partner Proposal', 'Negotiation', and 'Closed'. A button 'Mark Stage as Complete' is also present. The main area is titled 'Key Fields' and contains a 'Use Case Category' field with the value 'Retrieval augmented generation (RAG)', which is highlighted with a red box. The 'Details' tab is selected, showing sections for 'Information', 'Escalation Details', and 'LlamaX Details'. Under 'LlamaX Details', the 'Llama Implementation Details' section is expanded and highlighted with a red box. It contains fields like 'Production Confidence Level' (Mid), 'Hosting Method' (TogetherAI), 'Infrastructure' (On Premise), 'Infrastructure Partner' (Dell), 'Business Feedback' (LlamaX's pricing model is transparent and competitive.), 'Technical Feedback' (empty), and 'Engagement Status' (Mid). To the right of the main content are panels for 'Opportunity Team (1)' (Raghavam Murthy, Member R... Opportunity Owner), 'Activities (0)', and 'Notes & Attachments (0)'. The 'Notes & Attachments' panel includes a 'Upload Files' button and a placeholder 'Or drop files'.

TIPS:

- **"Use Case Category"** is the required field to move to the next stage
- To Exit, go straight to "Negotiation" Phase (click on that stage at the top)

Opportunity - Partner Proposal (*Skip for now*)

Takeaway | For LlamaX Opportunities, skip the "Partner Proposal" stage and move to the "Negotiation" stage.

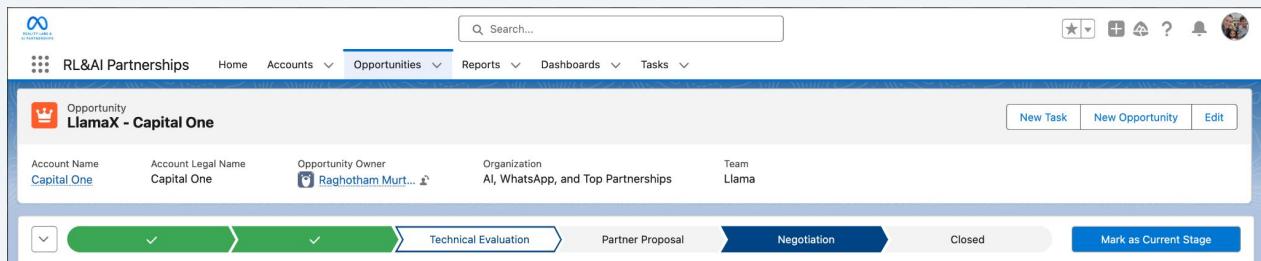
[SKIPPED FOR LLAMAX] Creating a proposal and quote for the partner, outlining the scope of work, timeline, and costs in a detailed breakdown.

Fundamentals:
UX and Navigation

Accounts and
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Opportunities and
Implementations

The "Partner Proposal" stage is not required for MVP, but will be used by other RL & AI Partnerships teams that need to go through a proposal process before negotiating a contract



Opportunity - Negotiation

Takeaway | The "Negotiation" stage is the final step before "Closed", where all details are finalized for a production deployment.

Conducting negotiations with the partner to reach a mutually beneficial agreement on terms and conditions.

Fundamentals:
UX and Navigation

Accounts and
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Implementations

The screenshot shows a CRM interface for an opportunity named "LlamaX - Conde Nast". The top navigation bar includes "New Task", "New Opportunity", and "Edit" buttons. The main content area is titled "Key Fields" and lists the following data:

- Techniques: Retrieval augmented generation (RAG)
- Business Impact: LlamaX has enabled us to develop predictive models, improving our ability to forecast demand.
- Planned Production Date: 10/3/2025
- Link to Agreement: <https://docs.google.com/document/d/12dEGfxCy1w9R6C2Cv7VmWJ6ChomZLUUOihawrNohfY/edit?tab=t.da3s7bbjoxd>
- Focus: Llama OSS

The "Details" tab is selected in the bottom-left corner, showing the following information:

- Opportunity Owner: Diego Guerra
- Organization: AI, WhatsApp, and Top Partnerships
- Opportunity Name: LlamaX - Conde Nast
- Team: Llama

A sidebar on the right is titled "Opportunity Team (1)" and lists "Diego Guerra" as the member role "Opportunity Owner".

TIPS:

- To progress from this stage to "Closed/Won", add Business Impact, Planned Production Date, link to any agreements, and the focus (products)

Opportunity - Closed/Won

Takeaway | To close an opportunity, click "Close" and create an Implementation to start the "Production"

Conducting negotiations with the partner to reach a mutually beneficial agreement on terms and conditions.

Fundamentals:
UX and Navigation

Accounts and
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Opportunities and
Implementations

The screenshot shows the Opportunity - Closed/Won page. At the top, it displays the opportunity name 'LlamaX - Block (Square)', account information ('Black Square Studios Ltd'), and various owners and teams. Below this, a progress bar indicates the opportunity's status. The 'Related' tab is selected, showing the 'Implementations' section. A red box highlights the 'New' button in this section. To the right, there's a sidebar for the 'Opportunity Team' with one member listed.

After "Closed/Won," the next task is for PE/SA to kick off an Implementation by going to the "Related" tab, clicking "New," and filling in the fields in the pop-up box.

TIPS:

- PE/SA can create an Implementation at any time, but it must be done by the time the opportunity is closed.

How to create an Implementation

Takeaway | Create implementations from the relevant Opportunity before moving it to “Closed/Won”

Fundamentals:
UX and Navigation

Accounts and
Account Teams

Opportunities and
Implementations

Step 1: Go to Opportunity >
Implementations tab > Click "New"

The screenshot shows the Opportunity page for 'LlamaX - Conde Nast'. At the top, there are tabs for 'New Opportunity' and 'Edit'. Below the tabs, the opportunity details are listed: Account Name (Conde Nast), Account Legal Name (Conde Nast), Opportunity Owner (Diego Guerra), Organization (AI, WhatsApp, and Top Partnerships), and Team (Llama). A progress bar at the top indicates the stage is 'Negotiation' and the status is 'Closed'. A button 'Mark Stage as Complete' is visible. Under 'Key Fields', there is a section for 'Business Impact' which states 'LlamaX has enabled us to develop predictive models, improving our ability to forecast demand.' Below this are fields for 'Planned Production Date' (10/3/2025) and 'Focus' (Llama OSS). At the bottom of the main area, there are two tabs: 'Details' and 'Implementations'. The 'Implementations' tab is highlighted with a red box. Below these tabs, there is a button labeled 'New'.

Step 2: Confirm and fill in the
information on the “New” screen,
then click Save

The screenshot shows the 'New Implementation' form. It includes sections for 'Implementation Information' (Implementation Name, Account, Status, Opportunity, Partner Manager, Partner Engineer, Start Date, Use Case Summary, Use Case Details, Technical Feedback), 'Opportunity Team' (Opportunity Team (1)), and 'Description/Notes' (Search People...). A note at the top right indicates that account information is required. A 'Save' button is located at the bottom right.

TIPS:

- **Create Implementation:** PE can create an Implementation at any Opportunity stage, but ensure it's done before "Closed/Won" or "Closed/Lost".
- **Pre-Populate Information:** Fill out as much Opportunity information as possible first, as key details will auto-fill into the Implementation record.
- **Delete Implementation:** Use the [feedback form](#)

Please use the link below to provide feedback, to ask for support, and more

<http://fburl.com/LlamaCRMfeedback>

Brought to you by RL & AI Partnerships StratOps



Stephanie Chen



Nico Cleminck

WHAT WE EXPECT FROM YOU

- Use the Salesforce CRM to do your day-to-day work
- Provide feedback on the workflow as LlamaX workflows continue to develop
- Do not spin up net-new trackers