Llama CRM

Overview and User Guide

Reality Labs & AI Partnerships

v2025.04.01

Meta

01 Context

02 What is built for the Llama MVP

03 Feedback & Feature Requests

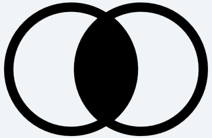
What have we built?

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)?

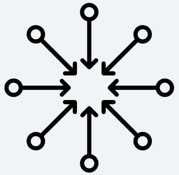
More Partners

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



More Complexity

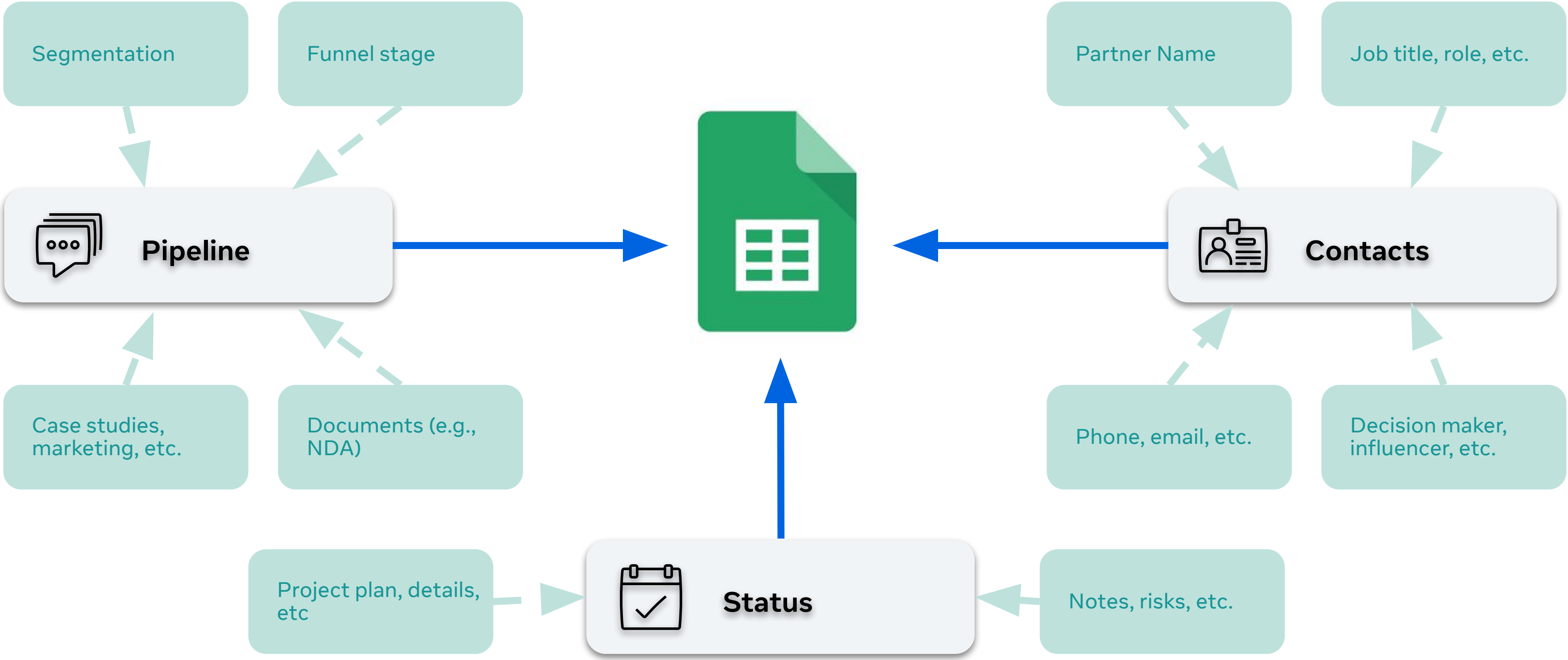
With the emergence of AI, there are now multiple touch points with a single partner across multiple teams



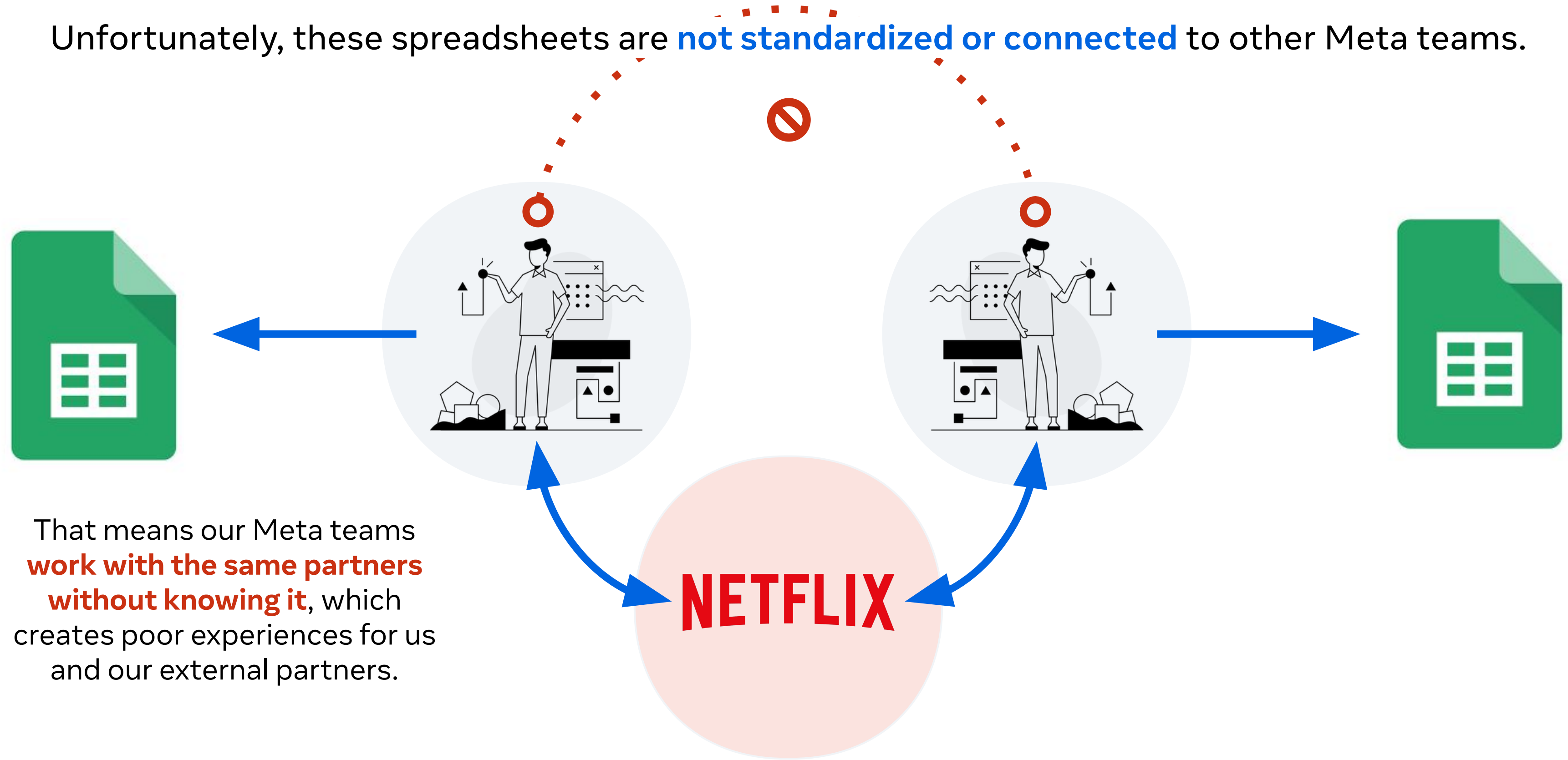
More Alignment

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.



That means our Meta teams **work with the same partners without knowing it**, which creates poor experiences for us and our external partners.

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

LlamaX CRM

Either a Customer or a Channel Partner

An engagement with the Customer

Translations, recommendation systems

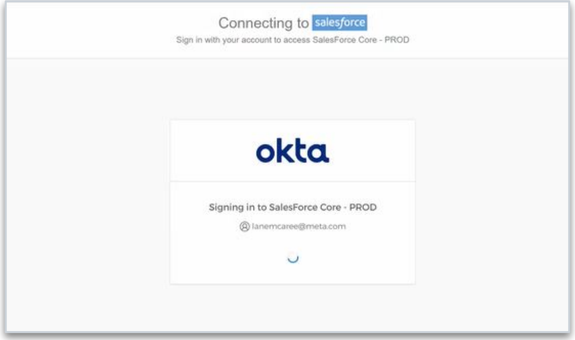
PR process starting from POC to production

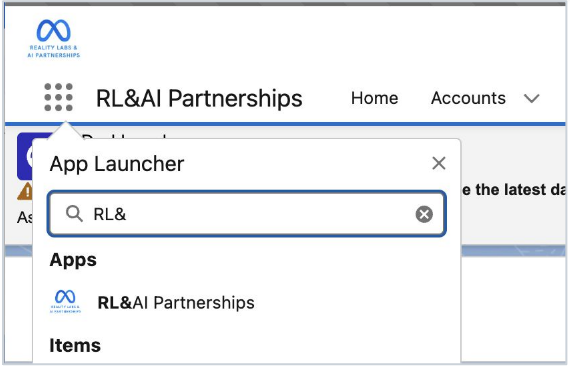
TBD, at Scope POC stage

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!





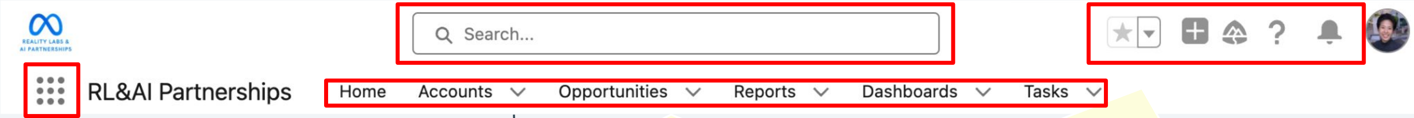
Navigation overview

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

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 <u>next slide</u>)*



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

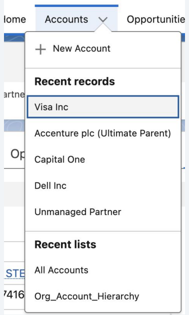
Click on a header (e.g., Opportunities) to view a list of related records.

<u>How to use these icons</u>

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

This will light up when you have a notification

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



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

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

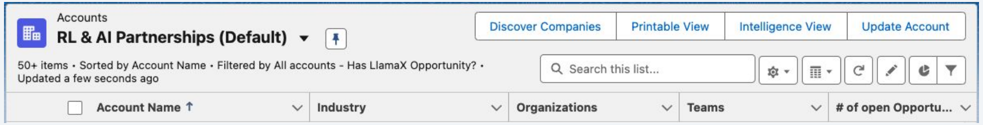
- The 3 default list views are the same for all users, except for Private Opportunities, which are only visible to Opportunity Team members, Executives, or StratOps

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

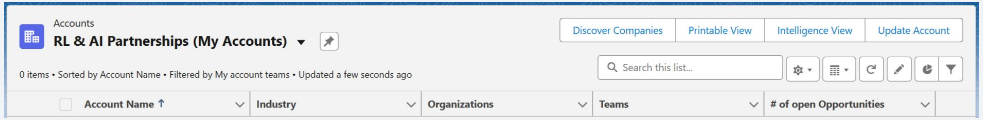
- This happens after clearing the cache from your browser. Simply re-pin the list again

ACCOUNT

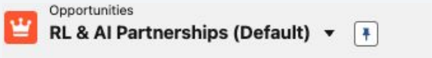
RL & AI Partnerships (Default) → List of all Accounts with at least 1 Llama Opportunity



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



OPPORTUNITY



List of all Llama Opportunities (looks same to all)

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

IMPLEMENTATION

List of all Llama implementations (looks same to all)

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

Fundamentals: UX and Navigation

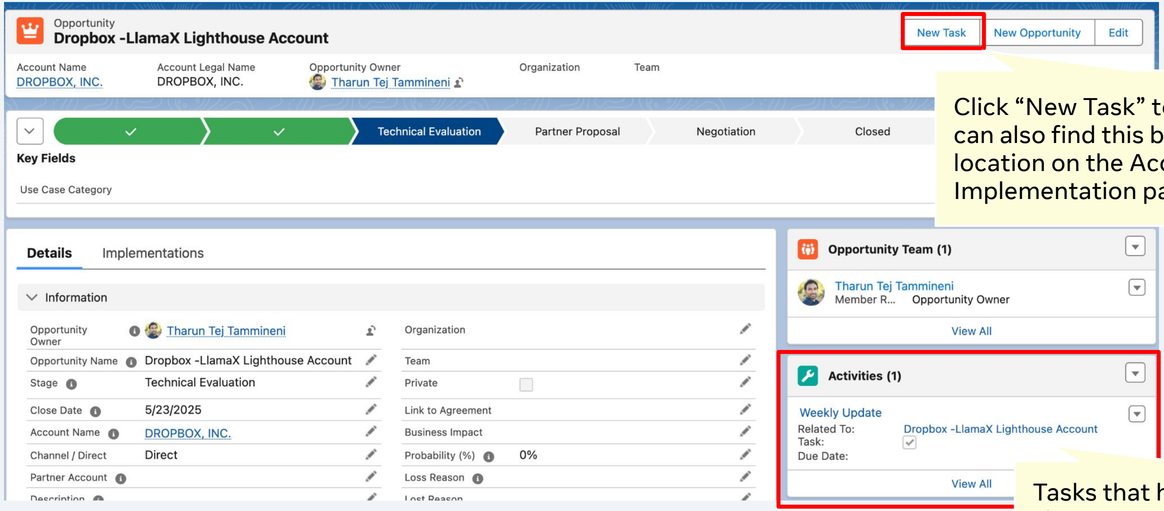
Accounts and Account Teams

Opportunities and Implementations

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.



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

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

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.

Fundamentals:
UX and Navigation

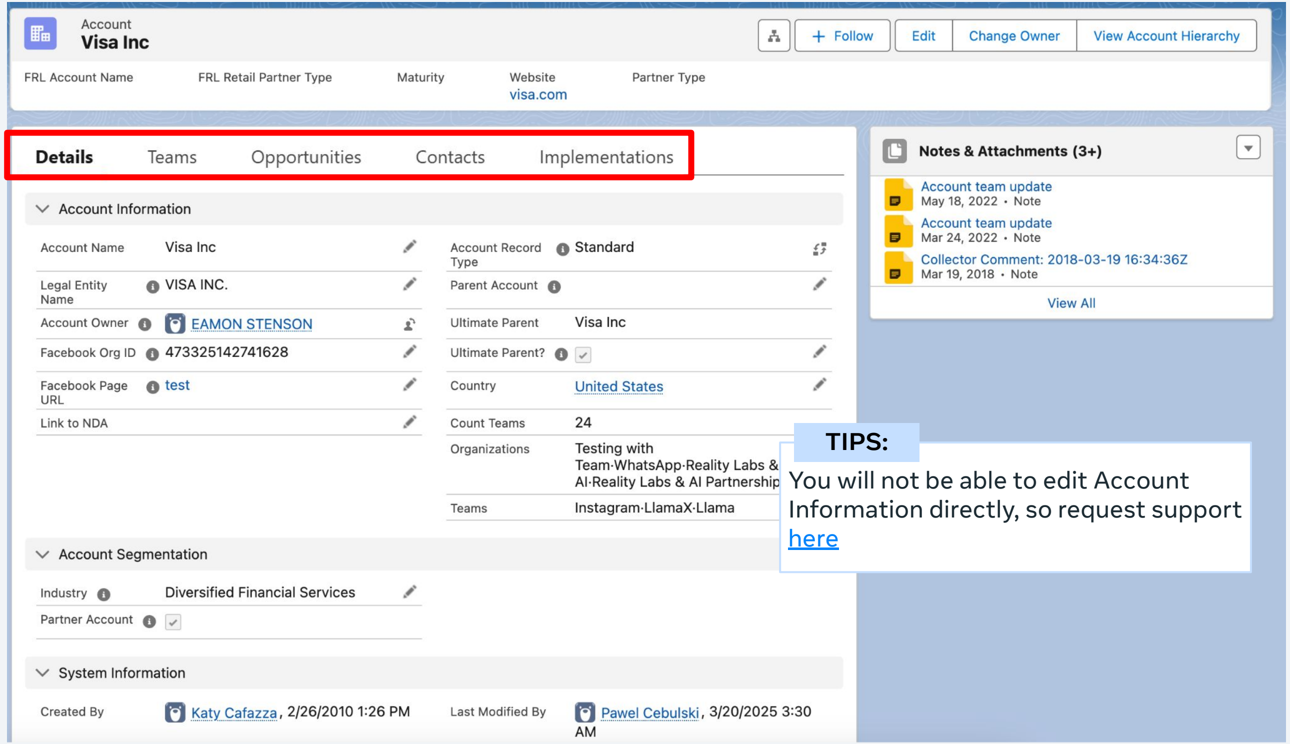
👉 **Accounts and Account Teams**

Opportunities and Implementations

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.



TIPS:

You will not be able to edit Account Information directly, so request support [here]

Fundamentals:
UX and Navigation

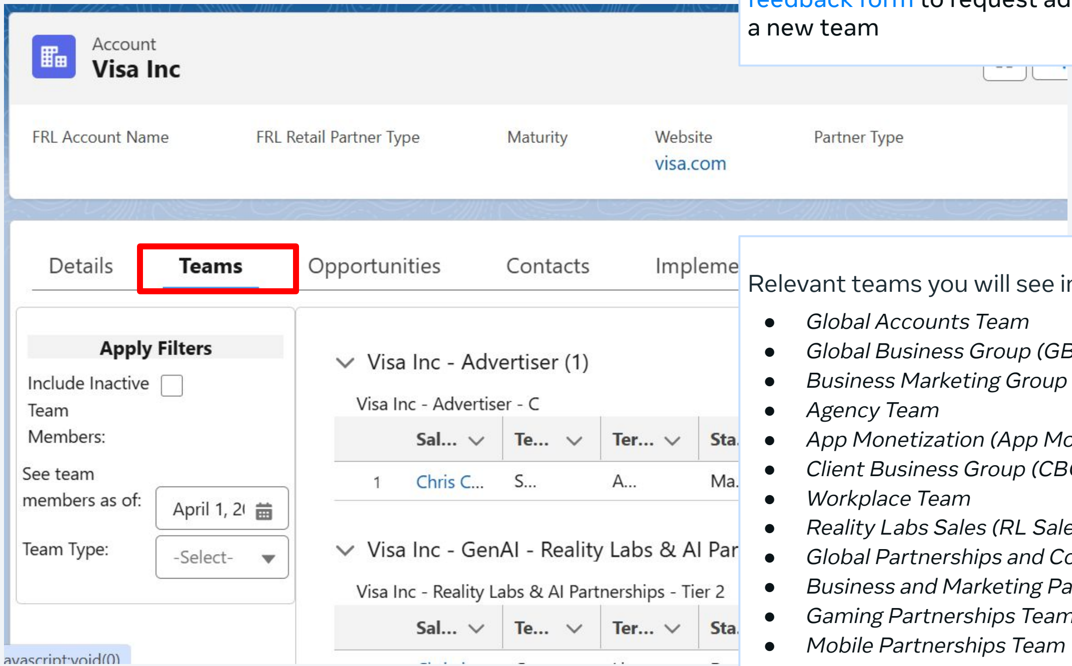
Accounts and Account Teams

Opportunities and Implementations

Account teams

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

View Meta teams assigned to the partner



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*

Fundamentals: UX and Navigation

Accounts and Account Teams

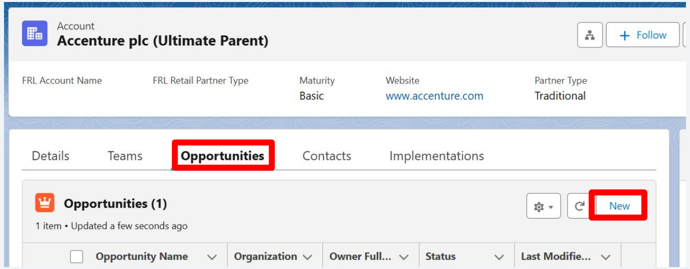
Opportunities and Implementations

How to create an Opportunity (1 of 2)

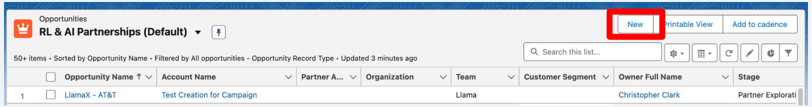
Takeaway | Create opportunities from a customer account, with one opportunity per use case

PREFERRED METHOD

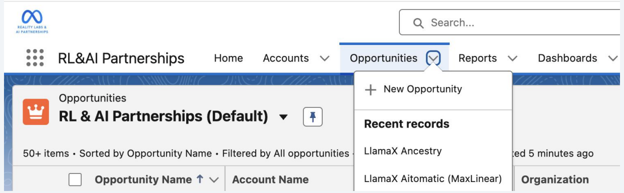
<u>Option 1:</u> Go to Customer Account > Opportunities tab > Click "New"



<u>Option 2:</u> Click “New” from **Opportunity list view**



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



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

Fundamentals: UX and Navigation

Accounts and Account Teams

Opportunities and Implementations

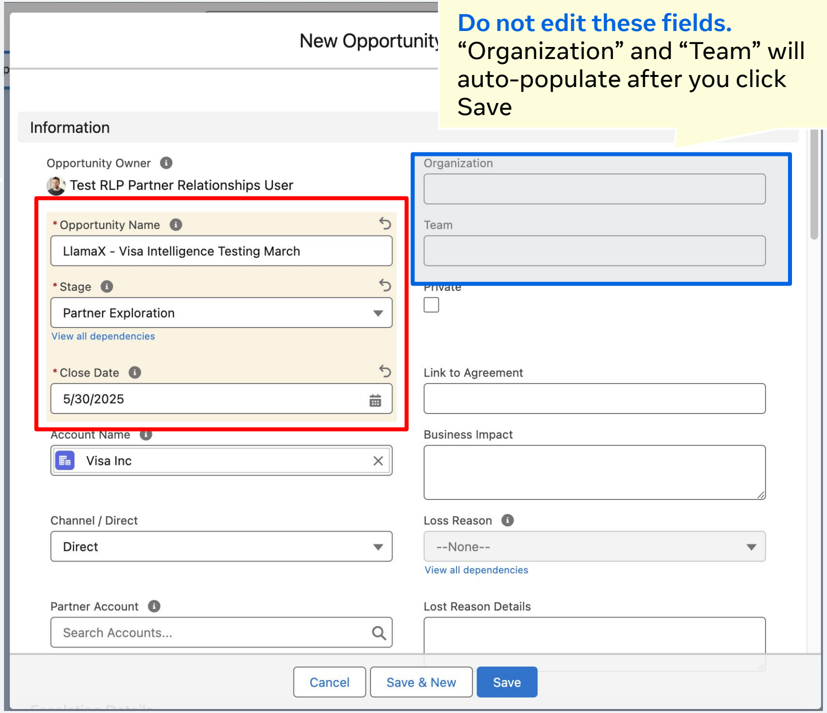
How to create an Opportunity (2 of 2)

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

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]



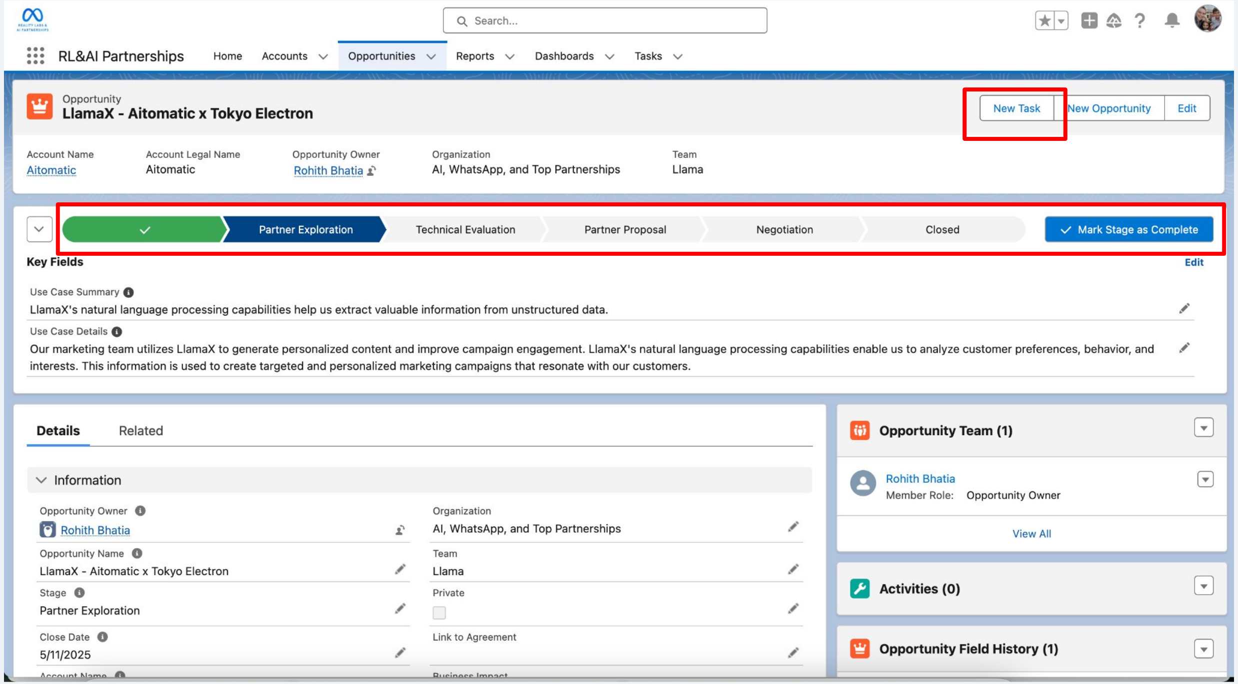
Do not edit these fields.
"Organization" and "Team" will auto-populate after you click Save

Managing an Opportunity

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

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.

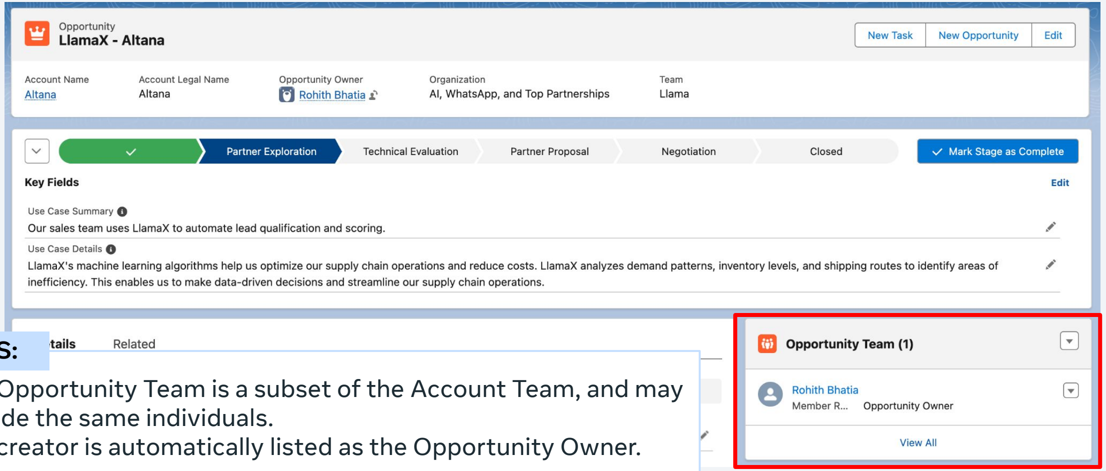
Fundamentals: UX and Navigation

Accounts and Account Teams

Opportunities and Implementations

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).



TIPS:

- 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.

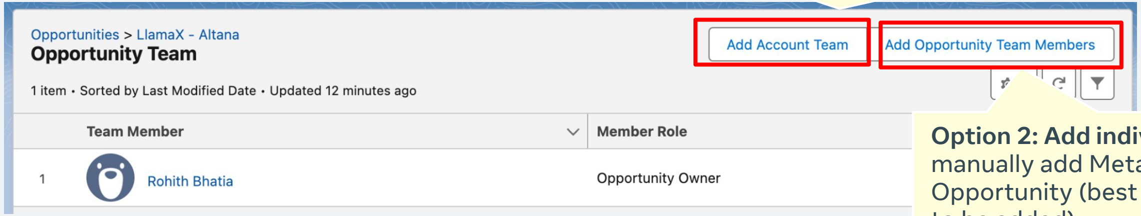
Opportunity team members are not automatically added to an Opportunity. You must manually add them to the opportunity *(detailed next)*

Opportunity Teams (2 of 3)

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

PREFERRED METHOD

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

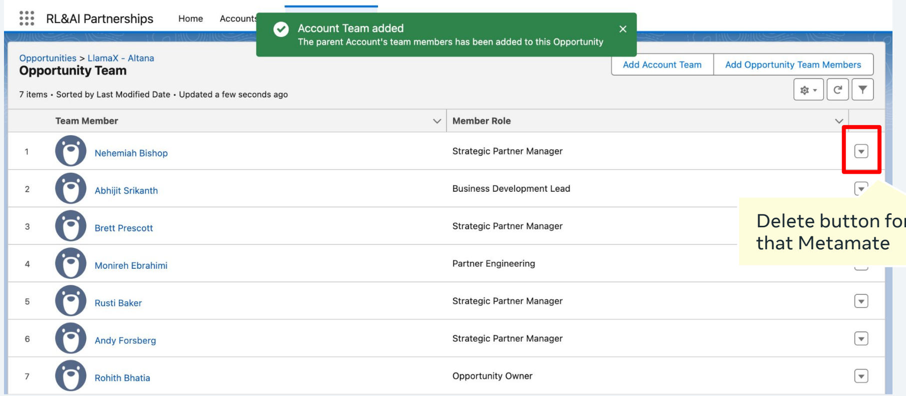


Option 2: Add individually - manually add Metamates to the Opportunity (best when XFN need to be added)

PREFERRED METHOD

Option 1: Automatic

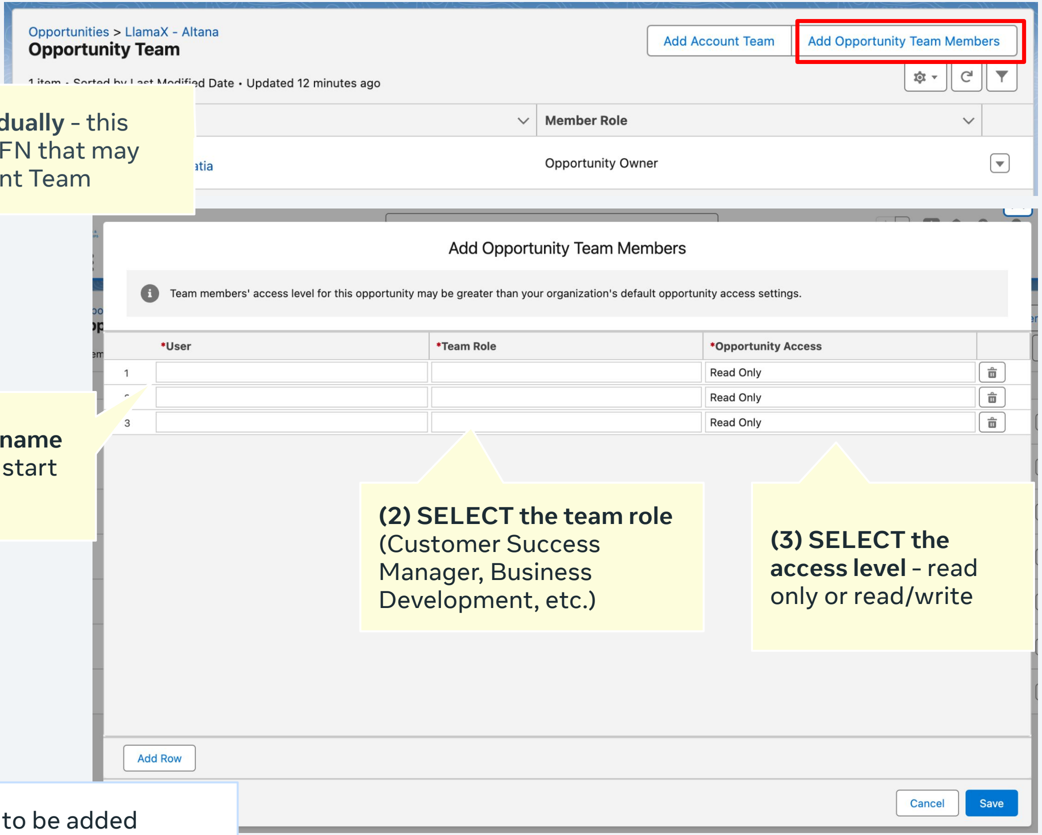
From this view, you can **delete** individuals that are not relevant to this specific engagement (click on carrot on right side)



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.



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.)

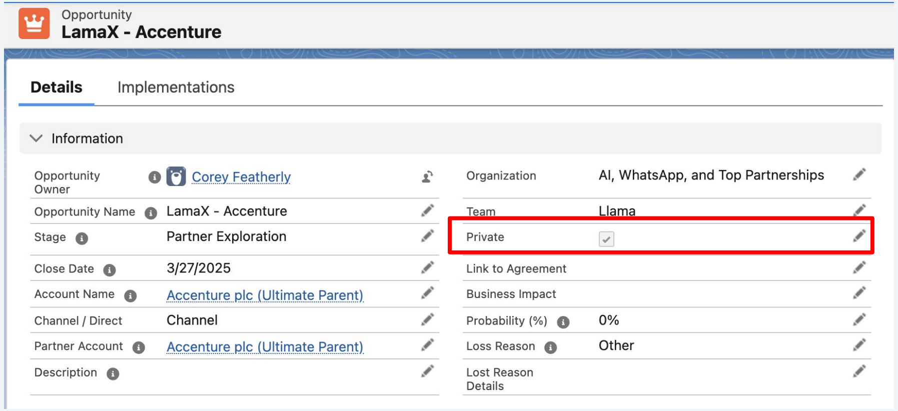
(3) SELECT the access level - read only or read/write

TIPS:

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

Private Opportunities (uncommon)

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



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

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.

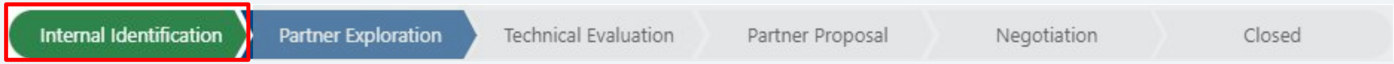
Easy setup tasks to personalize your UX

Accounts and Account Teams

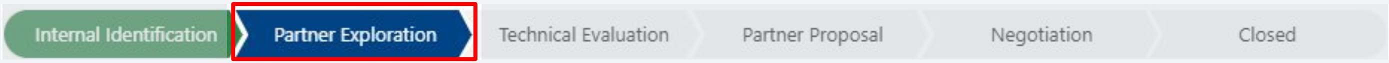
👉 **Opportunities and Implementations**

Stages in Opportunities

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



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.



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

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

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

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

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

Fundamentals:
UX and Navigation

Accounts and
Account Teams

Opportunities and
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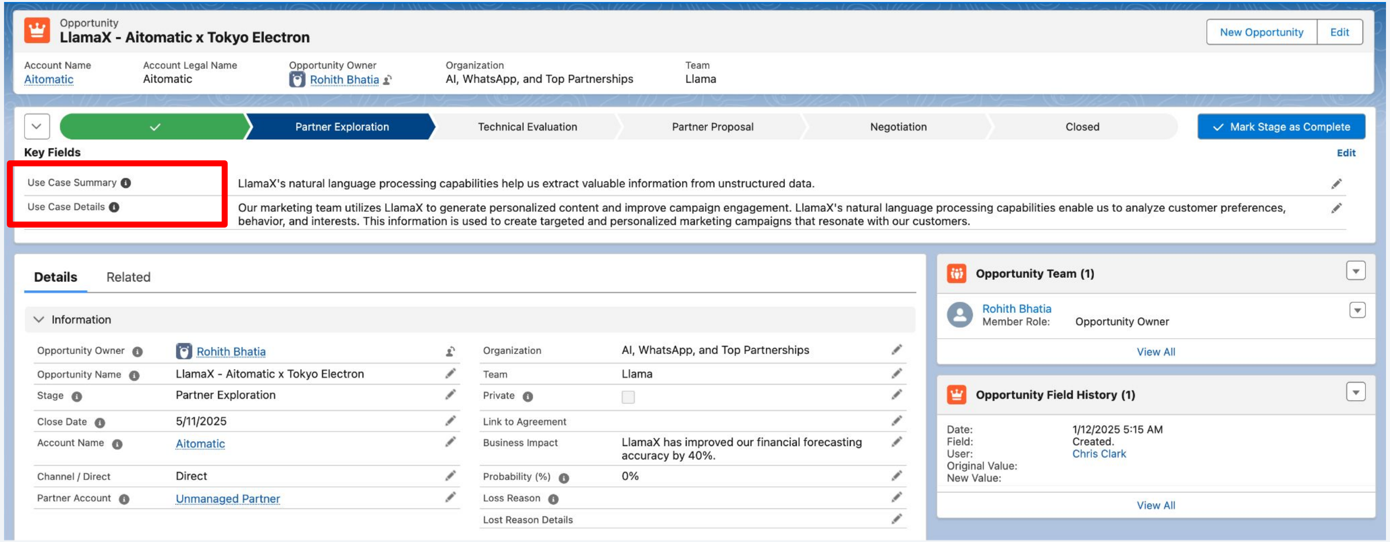
Opportunity - Partner Exploration

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.



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.

Fundamentals: UX and Navigation

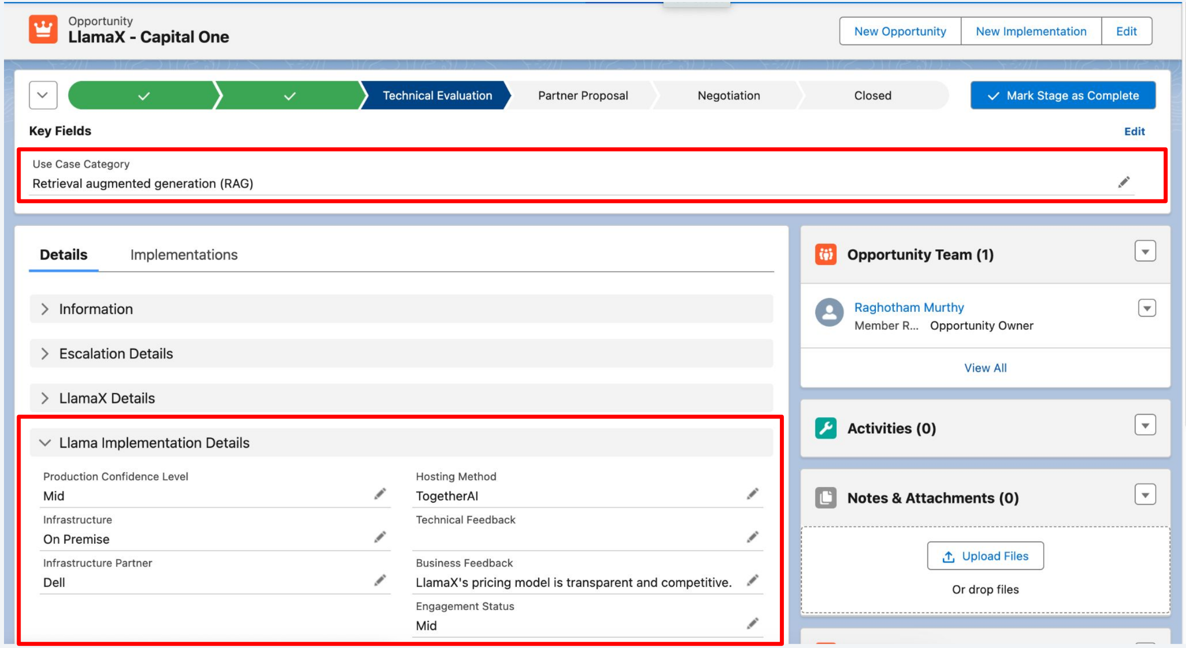
Accounts and Account Teams

Opportunities and Implementations

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.



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)

Fundamentals:
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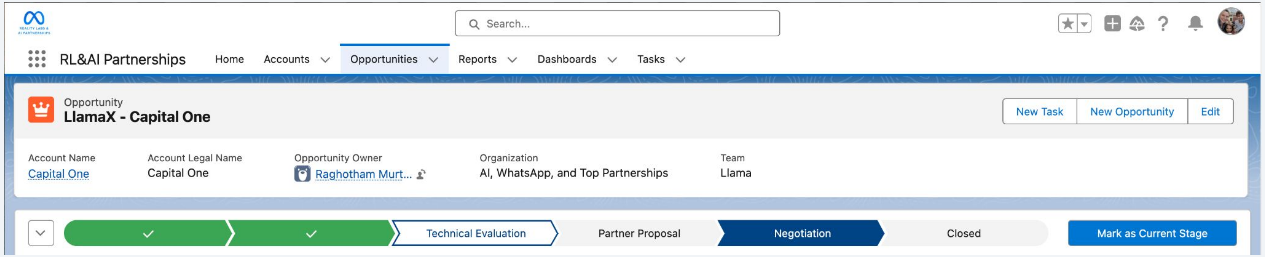
👉 **Opportunities and Implementations**

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.*

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



Fundamentals: UX and Navigation

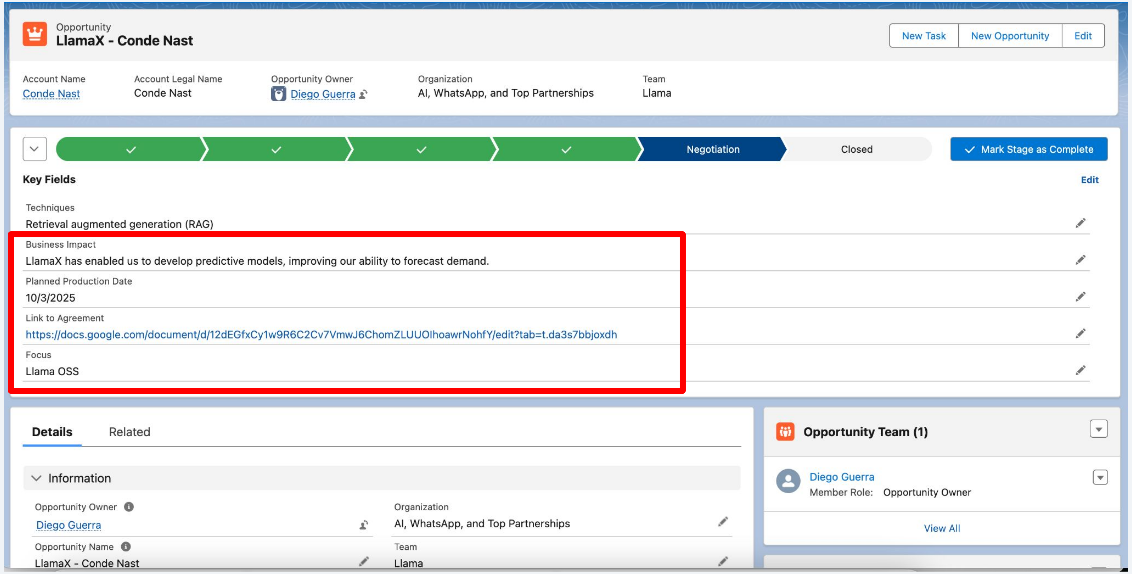
Accounts and Account Teams

👉 **Opportunities and Implementations**

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.



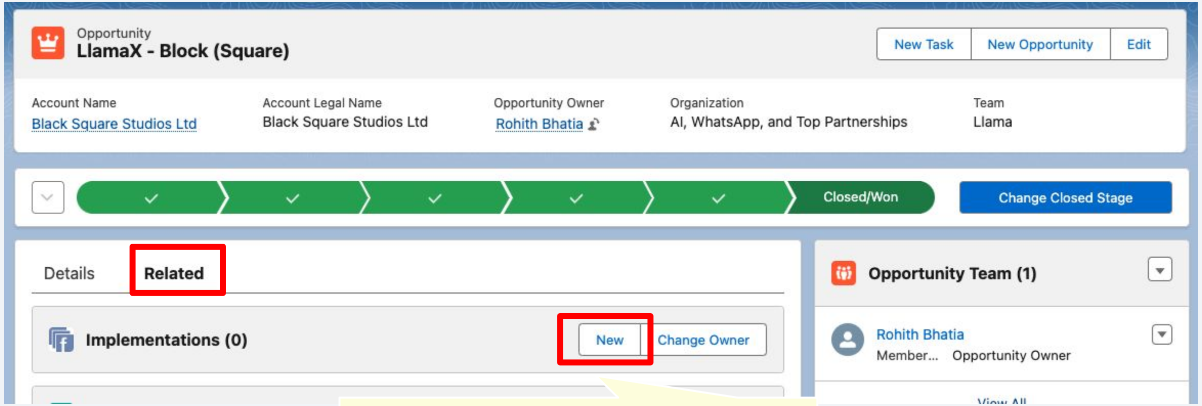
TIPS:

- 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.



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:

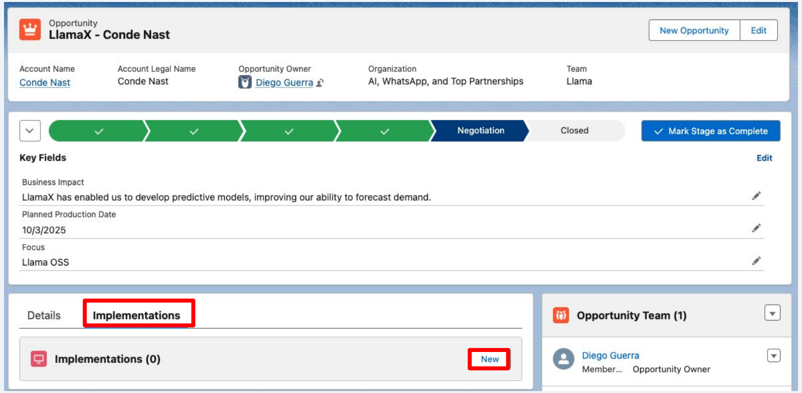
- PE/SA can create an Implementation at any time, but it must be done by the time the opportunity is closed.

- Fundamentals: UX and Navigation
- Accounts and Account Teams
- **Opportunities and Implementations**

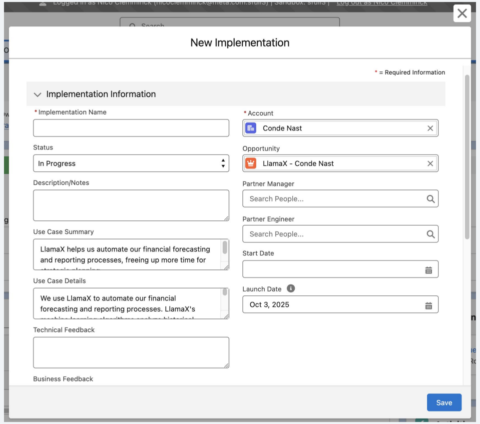
How to create an Implementation

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

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



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



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 Clemminck

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