

Business Manager
Agency Onboarding
Guide



LinkedIn Business Manager

LinkedIn Business Manager was built with flexibility in mind to fit you and your clients' specific needs.

This guide outlines how to educate your agency and clients on Business Manager and the steps to take to get up and running with Business Manager in no time.



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How to use this Guide

Click the **Home** icon to return to this page at any stage. Click the **Support** icon to explore our full list of Business Manager resources.



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What is Business Manager?

Business Manager is your agency's place to easily manage all of your **Ad Accounts** and **Client Pages**.

AGENCY BUSINESS MANAGER

PEOPLE

- Admins
- Employees
- Contractors

PARTNERS

- Client 1
- Client 2
- Client 3

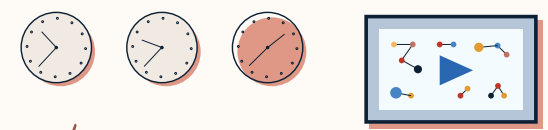
AGENCY AND CLIENT ASSETS

- Ad Accounts
- Pages
- Matched Audiences

Ad Accounts

Pages

Matched Audiences





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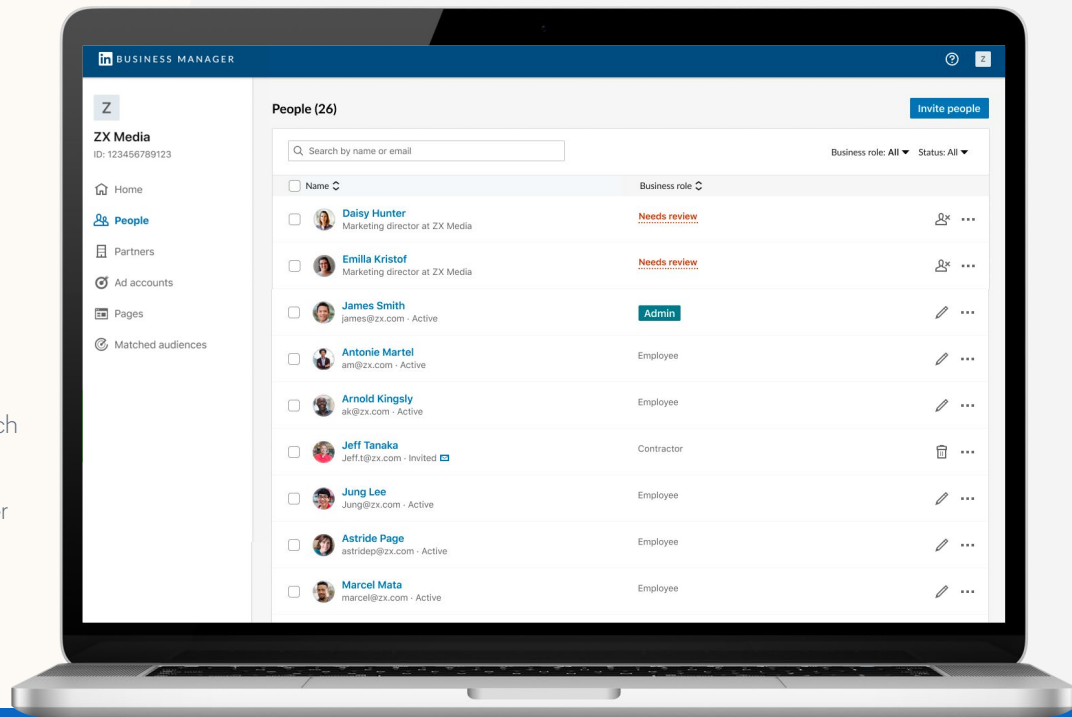
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What can you do with Business Manager?

- ✓ Link all your *Ad Accounts* and *Client Pages* to a single dashboard.
- ✓ Give all your people the *Ad Account* and *Client Page* access they need or remove them in a click - all from one place
- ✓ Seamlessly onboard and work with your clients by sharing *Ad Accounts* and *Pages* across Business Managers so each business can manage its own people's access
- ✓ Share Matched Audiences across *Ad Accounts* - whenever an audience is updated, that change is instantly reflected across all the *Ad Accounts* it's been shared to.





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Why Use Business Manager?





Reasons why you should use Business Manager:

Learn how Business Manager is designed to help your agency.

If this applies to you...

You can...

To help you...

1

You use multiple **Accounts & Pages** across your client roster

- Add all your **Ad Accounts** and **Client Pages** to Business Manager.

- Simplify your marketing experience on LinkedIn with central visibility across all your marketing activity.

2

You work with many clients

- Add Business Manager partners to share or get **Ad Account** and **Page** access with another business.

- Quickly onboard and work with clients by sharing **Ad Accounts** with them and getting access to their **Pages** so you can market on their behalf.

3

You have **large account teams**

- Add and remove multiple people across **Accounts** and **Pages** as well as audit who has access to what

- Easily ensure the right people have access to the right **Accounts** and **Client Pages**.

4

You use the **same audiences** across accounts

- Share Matched Audiences across **Accounts** or have clients share their Audiences, such as CRM audiences, with you

- Reach your clients' buyers easily across **Accounts**.

5

You want to use **client CRM audiences**

- Clients can share their Audiences, such as CRM audiences, with you

- Reach your clients' buyers without having to set up their CRM integration on your **Ad Account**



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How does Onboarding work?



Don't worry!

Getting started won't disrupt your current engagements:

- You don't need to recreate your *Ad Accounts* or client *Pages*.
- Your live campaigns, billing, and data integrations won't be impacted.
- Existing users on *Accounts* and *Pages* won't lose access.



This guide walks through onboarding in detail, but here are the high-level steps that can also be shared with your clients, who may need to create their own Business Manager



1

Add all your people:

Business Manager uses two-tiered permission model that allows people to get the precise access they need across Business Manager, *Ad Accounts*, and *Pages*.



[Go to Tutorial](#)

2

Add all your assets:

Business Manager enables you to safely and efficiently centralize ownership of your LinkedIn *Ad Accounts* and access to client *Pages*.



[Ad Accounts](#)



[Pages](#)

3

Add your clients as Partners:

Business Manager Partnerships are a secure and efficient way for multiple organizations to work together on the same *Ad Accounts* and *Pages*.



[Go to Tutorial](#)



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Considerations





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LinkedIn Recommendations for Onboarding

This guide will take you through the key decisions and actions LinkedIn recommends your agency should take through onboarding



Agency Leadership Discussion

- Identify internal champions (Capability Leaders such as VP of Activation, Social, Operations) for Business Manager to help drive initial considerations around:
 - How should we structure our Business Manager(s)
 - How should we rollout Business Manager across our client roster
 - How should we name our Business Managers



Delegate Onboarding to Account Directors

- Leadership should delegate onboarding to Group/Account Directors across the agency to help drive:
 - Account team education, client education, and onboarding of people & assets to Business Manager on a client-level



Account Teams and Client Engagement

- Account Directors should educate day-to-day account teams and clients about the onboarding process and what it means to move to Business Manager.
- This will include:
 - What changes when the agency starts using Business Manager
 - How agencies and clients should optimally work together with Business Manager



Begin Onboarding

- Compile lists of people and assets to add to Business Manager.



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Onboarding Considerations

Click on each section to learn more about the key decisions you need to make before Onboarding.



A

Review
Pre-Onboarding
Checklist

[Click for details](#)

B

Decide on Business
Manager Setup
(one or many)

[Click for details](#)

C

Decide which Agency roles will
map to Business Manager roles
and how permissions will
migrate to Business Manager

[Click for details](#)

D

Decide whether to
advise your Clients to
create their own
Business Manager

[Click for details](#)

E

Decide how you (Agency)
and Clients can work
together across **Ad
Accounts** and **Pages**

[Click for details](#)



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A. Review Checklist

Review before you onboard
to Business Manager





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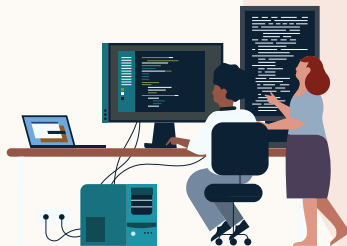


Checklist for success

Things to think about before you onboard to Business Manager:



Important: Initially there will be a 1k Ad Account limit for Business Manager that will be gradually raised, so start by adding your active *Ad Accounts*.



Identify POCs to lead onboarding and internal comms

We recommend Group/Account Directors with good visibility across your client portfolio who are in regular contact with your account teams.



Think through how to organize your Business Manager

Do you want one global Business Manager for better visibility? Or are your marketing activities separate across regions or business units?



Compile Accounts, Pages, and People

Identify the employees and their corporate emails for the people you'll invite to Business Manager, as well as your *Ad Account* IDs and client *Pages*.



Decide Agency-Client Ad Account ownership

Business Manager allows one business to own an *Ad Account* or *Page* and others to access it. The smoothest experience is for the company that manages billing to be the owner. LinkedIn can support transferring ownership through a support process if both parties agree. We recommend baking Ad Account ownership into your contracts/statements of work moving forward.



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B. Business Manager Setup Options

Decide on one Global Business Manager or multiple divided by region, client, or another factor





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Business Manager is built to be flexible for however your agency wants to operate with clients



Choose this one if you are a smaller agency with the majority of your operations in a few key markets



Choose this option if you are a large agency with robust regional operations that are managed independently



Choose this one if you have a large client potentially serviced by a sub-agency



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Business Manager Recommendations

One Business Manager

Best if global visibility is top priority

- **Pro:** All your operations can be tracked from one place.
- **Con:** May lead to a less organized Business Manager, unless you use consistent *Ad Account* naming conventions. Too many people may require Admin access causing many people with super admin access.

Note: You can have *Ad Accounts* with different billing and currencies in the same Business Manager.

Multiple Business Managers

Better if tight control of access is a top priority

- **Pro:** Requires fewer Admins on a per Business Manager level and promotes a more organized Business Manager.
- **Con:** Harder to maintain overall visibility across the entire agency and your clients will likely have to share *Page* or *Ad Account* access to multiple of your agencies' Business Managers if your Business Manager's all need access to the same *Ad Accounts* or *Pages*



If you need more help evaluating pros and cons of each option, download our detailed guide to help you setup your Business Manager

[Download Guide](#)



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C. Roles and Permissions Migration

Decide which roles at your agency will map to which Business Manager roles and how moving your people to Business Manager will work.





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Before onboarding, review role definitions and when to use each.

Admins lead onboarding.



	Role Overview	When to use
Admin	<ul style="list-style-type: none"> <i>Admins</i> have super access. They can invite employees, add <i>Ad Accounts</i> and <i>Pages</i>, create <i>Partnerships</i>, share/unshare Matched Audiences, and access all <i>Ad Accounts</i> and <i>Pages</i>. 	<ul style="list-style-type: none"> Recommended for Associate Account Directors or higher that require complete views of your marketing activities and are in charge of user permissions. You should limit to as few as possible but always 2+ to avoid lockouts.
Employee	<ul style="list-style-type: none"> Employees have view only access and can only access the specific <i>Ad Accounts</i> and <i>Pages</i> that they've been permissioned for. 	<ul style="list-style-type: none"> Use for day-to-day account teams that only require specific access or people managers who oversee a portion of your client's business.
Contractor	<ul style="list-style-type: none"> Contractors have limited view access and can only access the specific <i>Ad Accounts</i> and <i>Pages</i> that they've been permissioned for. 	<ul style="list-style-type: none"> Use for people that work for another company.



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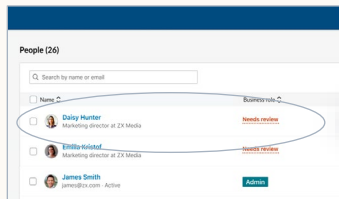
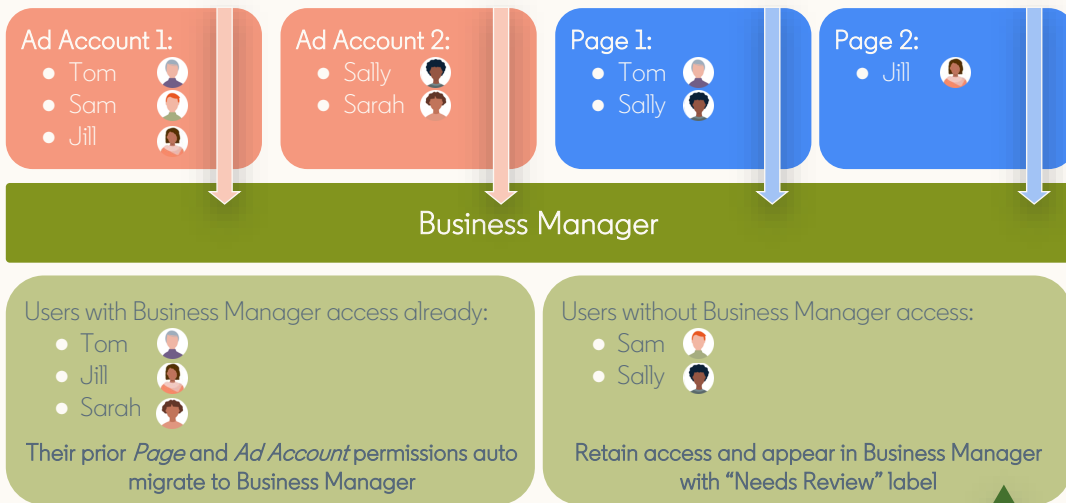
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We've made migrating prior Ad Account and Page user access to Business Manager easy. When people with access to Ad Accounts and Pages that you own get added to your Business Manager, their permissions will migrate. People that haven't been invited to your Business Manager will be flagged for review.



You can then:

- Invite user to Business Manager and their permissions will migrate automatically
- Remove user to remove them from your client's *Ad Accounts* and *Pages*
- Do nothing and they'll retain their access. This can be used to give another business access. With employees across multiple businesses accessing the same *Ad Accounts* and *Pages*, this gives other companies time to create their own Business Managers.



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D. Do your clients need their own Business Managers?

Decide whether to advise your clients to create their own Business Manager and to work together using Business Manager Partnerships





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Does your client need their own Business Manager?

Answer these questions to understand how different attributes for a given client impacts if they'll need or benefit from having their own Business Manager.

1	Does your client manage some of their own marketing in-house?	With Business Manager your client can have a single place to see all their agency and in-house managed activities.
2	Does your client work with multiple agencies?	With Business Manager your client can have a single place to see activity across all the agencies they work with and easily share Page access to agencies
3	Does your client have multiple Pages they advertise from?	With Business Manager your client can have a single place to efficiently and securely share Pages access to their agencies, including the ability to remove all agency employees from their Pages in a single action
4	Does your client require access (e.g Viewer) to its your(agency) Ad Accounts?	With Business Manager your client can scalably manage their own employees' access your Ad Accounts you share with them.
5	Does your client have 1st party audiences including CRM/Marketing Automation audiences they want you to use in their campaigns?	With Business Manager your clients can dynamically share matched audiences, including CRM or other integration audiences, without allowing you to view, edit, or copy the audiences or setup the integration directly on your Ad Account.



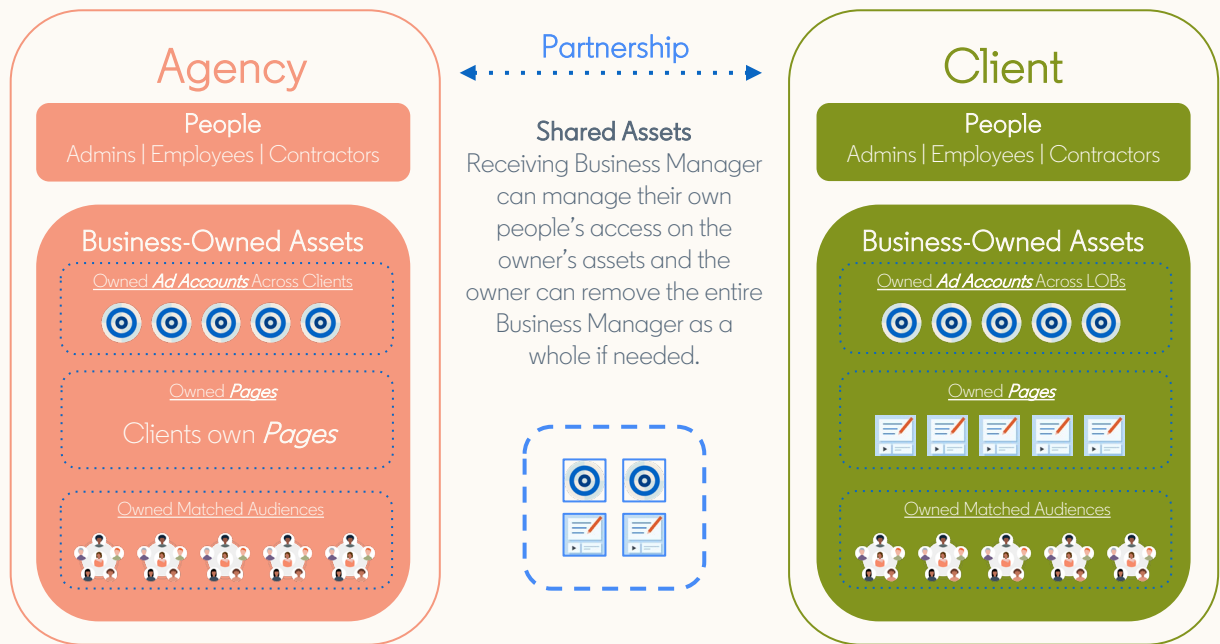
Tip: If you answered 'Yes' to any of these questions, you should engage clients about creating their own Business Managers and using Partnerships to share access to Ad Accounts and Pages with one another.



Want to help advise your clients on how to set up their Business Managers?
[Here's a detailed overview.](#)



If your client creates their own Business Manager, then Partnerships are the most secure and efficient way to work together.





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E. Ad Account & Page Setup

Decide how you and your clients can work together across *Ad Accounts* and *Pages*





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Determine how you'll use Business Manager with Clients

These options will dictate how you engage them and add *Ad Accounts* and *Client Pages*.



Business Manager User(s)	Account and Pages Ownership Options	
Agency only	Agency will own <i>Ad Accounts</i> and request access to <i>Client Pages</i>	Compare
	Agency requests access to <i>Client Ad Accounts</i> and <i>Pages</i>	Compare
Agency & Client (Partnership)	Agency will own <i>Ad Accounts</i>	Compare
	Clients own <i>Accounts</i> and <i>Pages</i> , and will share with Agency	Compare



If only Agency uses Business Manager, and owns the Ad Accounts

LinkedIn recommends, but doesn't enforce, that the billing party on the *Ad Account* be the owner

Compare to...

- [Only Agency uses Business Manager, and needs access to Client Ad Accounts & Pages](#)
- [Both Agency & Client use Business Manager, and Agency will own Ad Accounts](#)
- [Both Agency & Client use Business Manager, and Client will own Ad Accounts and Pages](#)

Pros	Cons
<ul style="list-style-type: none"> ✓ Majority of onboarding is in agency's control as the only dependency with client is their approval of your <i>Page</i> requests ✓ Your agency will have full control over <i>Ad Accounts</i> including sharing Matched Audiences 	<ul style="list-style-type: none"> ✗ If client employees require access to agency <i>Ad Accounts</i>, they'll need to be added to your Business Manager ✗ Client cannot share Matched Audiences from their <i>Ad Accounts</i> to yours





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If only Agency uses Business Manager, and needs access to Client Ad Accounts & Pages

Compare to...

- [Only Agency uses Business Manager, and will own Ad Accounts](#)
- [Both Agency & Client use Business Manager, and Agency will own Ad Accounts](#)
- [Both Agency & Client use Business Manager, and Client will own Ad Accounts and Pages](#)

Pros	Cons
<ul style="list-style-type: none">✓ Simplest onboarding steps for agency	<ul style="list-style-type: none">✗ Heaviest reliance on client to approve all <i>Ad Account</i> and <i>Page</i> requests✗ Client controls the <i>Ad Account</i> and can remove your agency✗ Matched Audience Sharing will be unavailable





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If both use Business Manager, and Agency owns Ad Accounts

In this scenario, your clients own *Pages*, you share *Accounts* with clients, and clients share *Pages* with you.

Compare to...

- [Only Agency uses Business Manager, and will own Ad Accounts](#)
- [Only Agency uses Business Manager, and needs access to Client Ad Accounts & Pages](#)
- [Both Agency & Client use Business Manager, and Client will own Ad Accounts and Pages](#)

Pros

- ✓ Agency has full control over *Ad Accounts* including sharing Matched Audiences

Cons

- ✗ Partnerships in general require more coordination between agencies and clients





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If both use Business Manager, and Client owns both Accounts and Pages

Compare to...

- [Only Agency uses Business Manager, and will own Ad Accounts](#)
- [Only Agency uses Business Manager, and needs access to Client Ad Accounts & Pages](#)
- [Both Agency & Client use Business Manager, and Agency will own Ad Accounts](#)

Pros	Cons
<ul style="list-style-type: none">✓ Majority of onboarding tasks falls on client and not agency	<ul style="list-style-type: none">✗ Client controls the <i>Ad Account</i> and can remove your agency✗ Would rely on client to share Matched Audiences across Accounts





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Onboarding Preparation

The templates in this section will help you organize onboarding as your agency:

1. Compiles the people and assets to add
2. Engage client points of contact
3. Communicate next steps to client





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A. Compile People & Assets to Add

Gather everything you need to start building out your team on Business Manager





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Compile Relevant Information

Use these templates to compile a list of *Pages*, *Ad Accounts*, and *People* that you need to add to Business Manager, as well your onboarding statuses across clients.

[Download Template](#)

Ad Account IDs

Identify relevant *Ad Account IDs*



Page Names

Identify *Client Pages* that you need to add



Work emails of your people

Identify the employees and their corporate emails you'll invite to Business Manager



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B. Agency Account Team Education

Educate relevant agency team members





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To Internal Agency Team Members

Use this email template to share that your agency is going to be using Business Manager

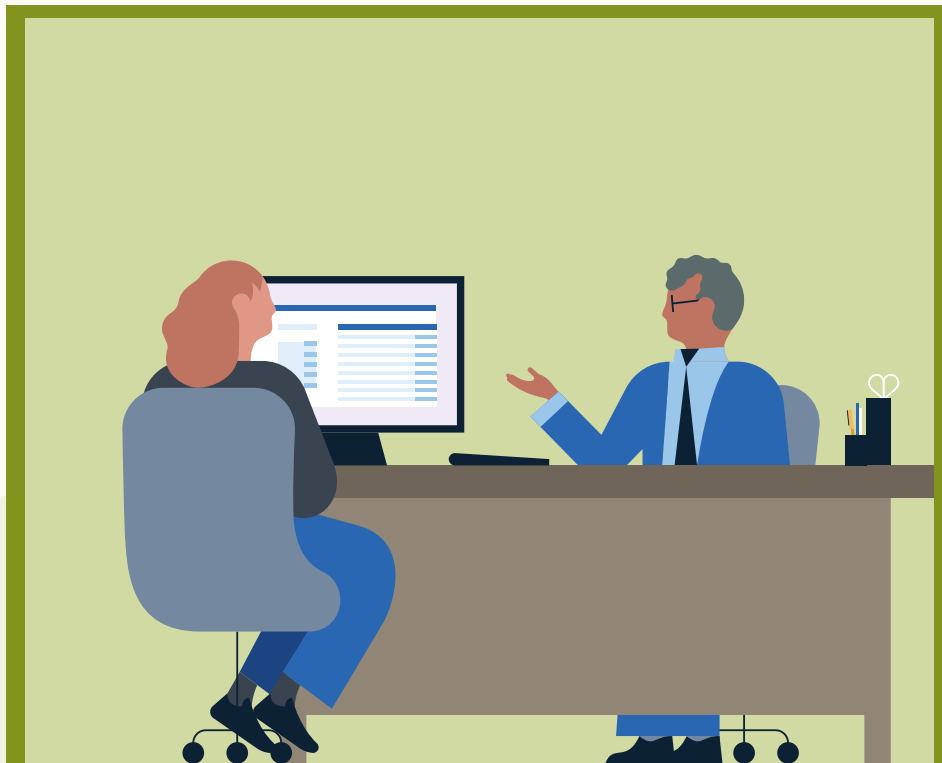


Download Template



Helpful Resources

- [Onboarding Overview](#)
- [Getting Started Guide](#)





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C. Client Team Education

Inform client about next steps





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Agency to Client: Engagement Email

Per client, select the relevant attributes to download a customized Business Manager engagement kick-off email.



Helpful Resources

- [Overview of Business Manager](#)

Client should have its own Business Manager	Billing Party on Ad Accounts	Templated Outreach
Yes	Agency, so agency should own <i>Ad Accounts</i>	View Email
Yes	Client, so client should own <i>Ad Accounts</i>	View Email
No	Agency, so agency should own <i>Ad Accounts</i>	View Email
No	Client, so client should own <i>Ad Accounts</i>	View Email



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Agency to Client: Next Steps Email

Per client, select the relevant attributes to download a customized Business Manager onboarding next steps email.

Helpful Resources

- [Overview of How Agencies & Brands Can Work Together](#)
- [Onboarding Overview](#)
- [Full Guide to Business Manager](#)

Client will have its own Business Manager	Ad Account and Page Owners	Templated Outreach
Yes	Client owns both	View Email
Yes	Agency owns <i>Ad Accounts</i> Client owns <i>Pages</i>	View Email
No	Client owns both	View Email



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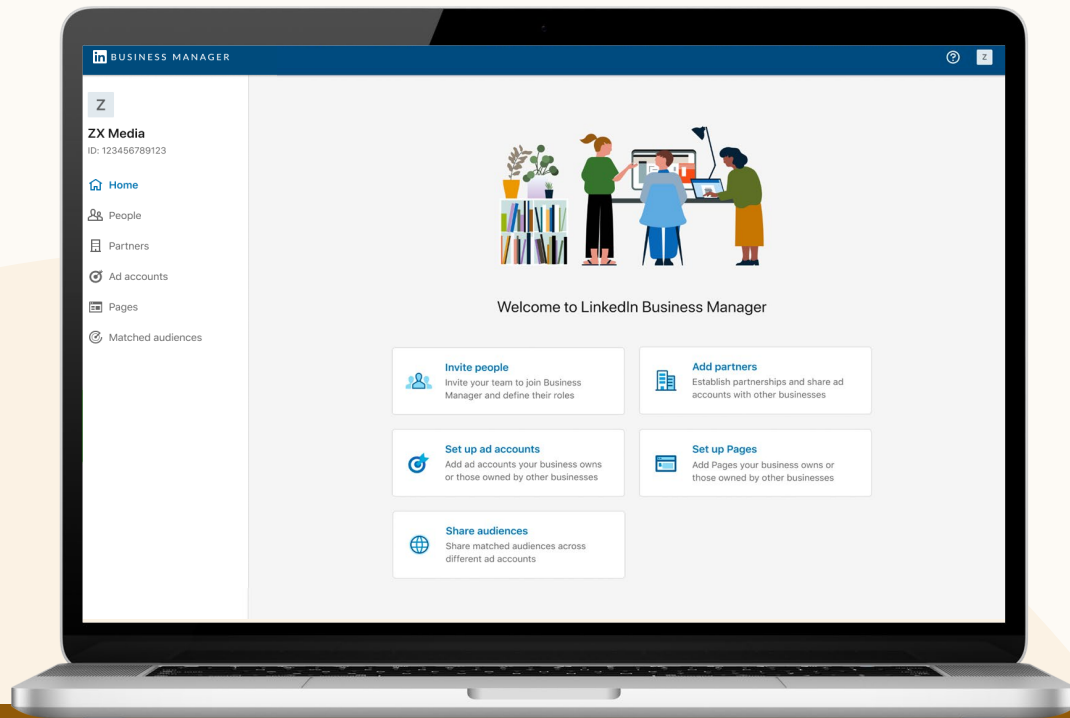
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Onboarding Steps

- A Create your Business Manager
- B Invite Admins
- C Add Ad Accounts
- D Add Pages
- E Review Access
- F Setup Partnerships





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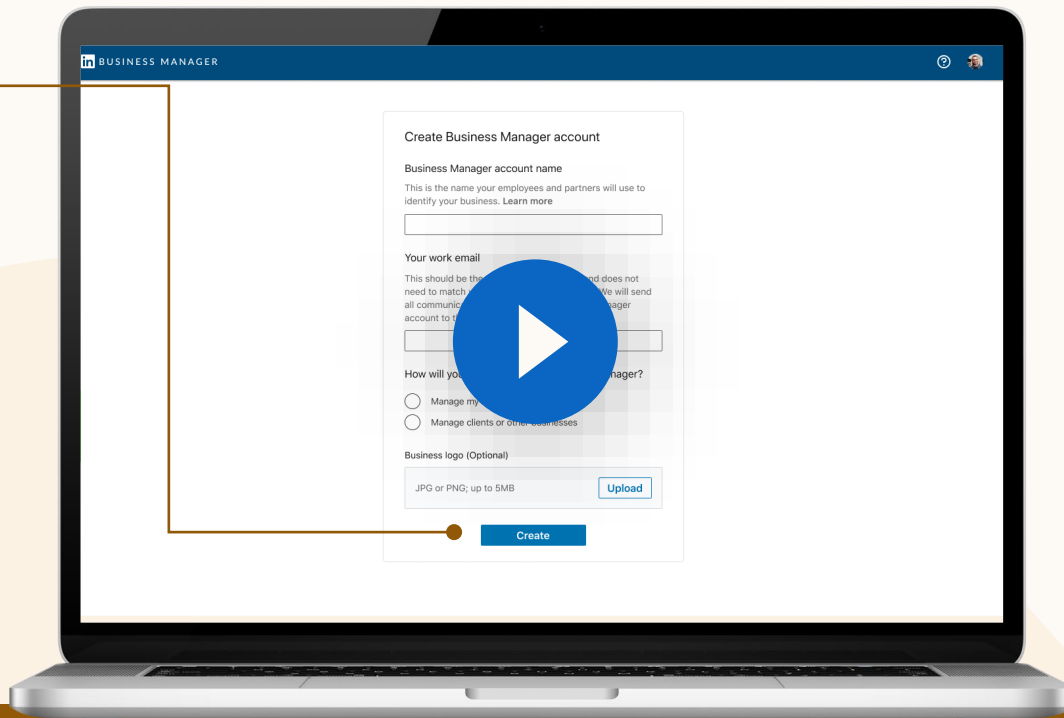
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Create Your Business Manager

Click Create to get started

We suggest incorporating Parent Company and Subsidiary/Geo/Business Unit into your Business Manager Name so clients can recognize your business (e.g. LinkedIn North America Business Manager) and establishing consistent naming conventions for better organization.





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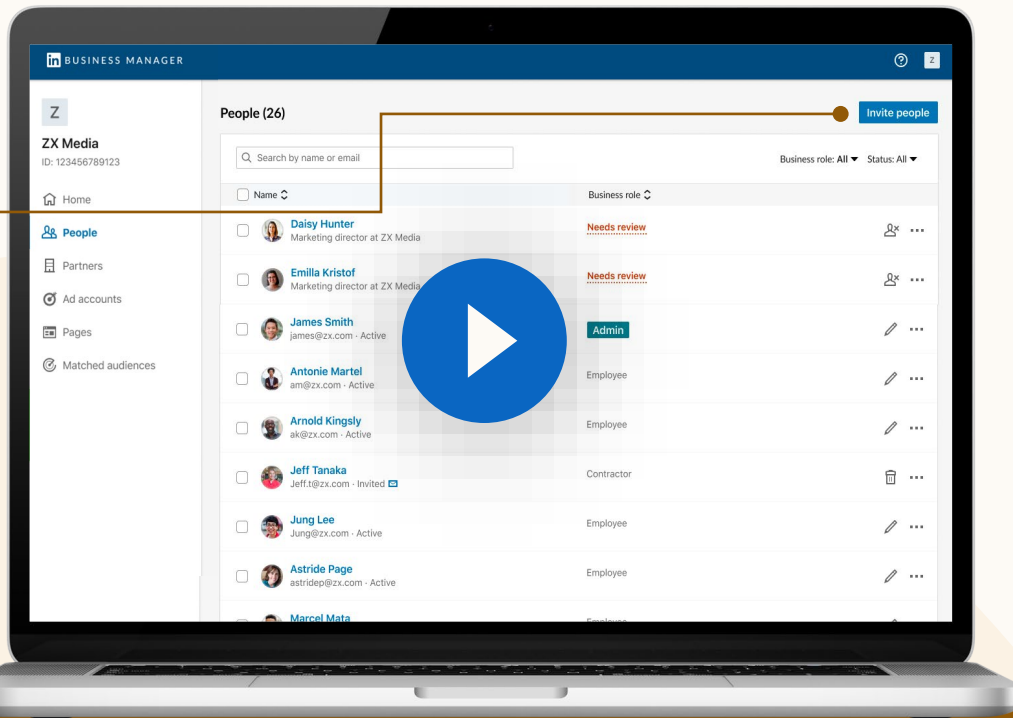
Invite Admins

Invite your team

Invite people by clicking the button and entering their work emails. These emails don't need to be associated with their LinkedIn profiles.



Tip: Add a comma in between emails to invite multiple people at once. Start with Admins before inviting Employees and Contractors. Learn more about Roles [in this short explainer](#).





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Invite Admins

People must accept email invitation



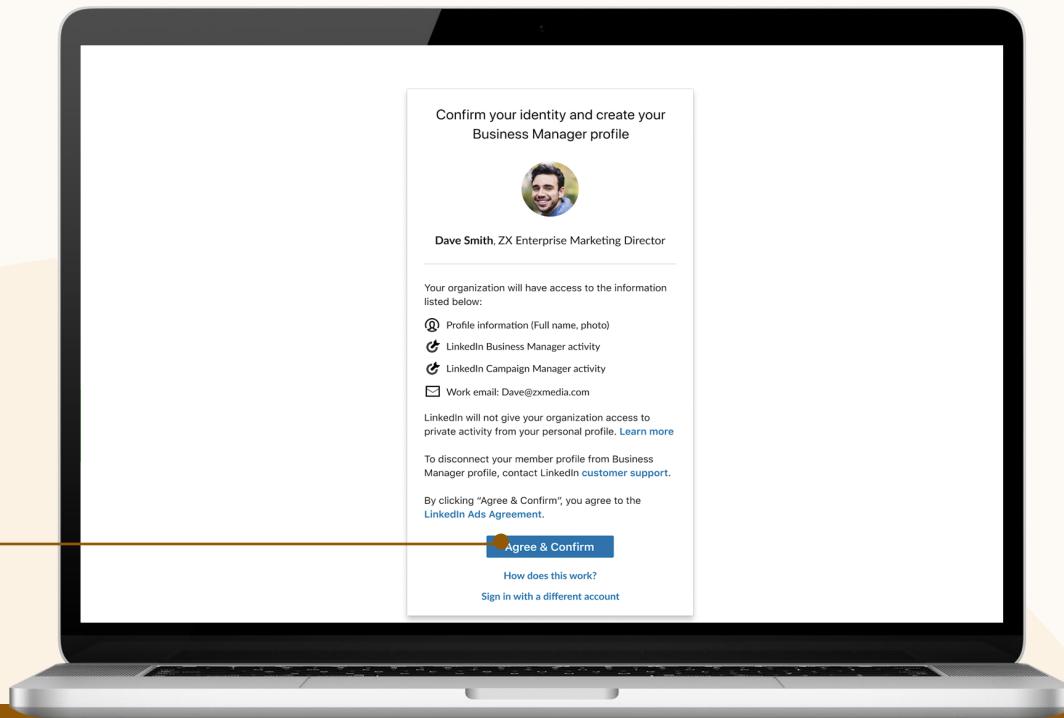
This creates a Business Manager Profile for that person.



They will use it to access Business Manager *Ad Accounts & Pages* moving forward.



They will retain access to any *Ad Accounts* and *Pages* they had access to prior to Business Manager.





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Add Ad Accounts

Add Ad Accounts to Business Manager



Tip: You can add up to 200 *Ad Accounts* at a time using CSV. There is 1K total *Ad Account* limit so start with active *Ad Accounts*.



Tip: If the person adding the *Ad Account* is already an Account Manager on it, it will be auto-approved otherwise email approvals will be sent to existing Account Managers.



How to approve requests

Ad Account Owners	Scenarios	Instructions
Agency will own Ad Accounts	Add by entering Account IDs	 Go to Tutorial
	Add by uploading CSV	 Go to Tutorial
Client will own Ad Accounts	Add when Client does not have Business Manager	 Go to Tutorial & Email Template
	Add when Client has Business Manager	 Go to Tutorial



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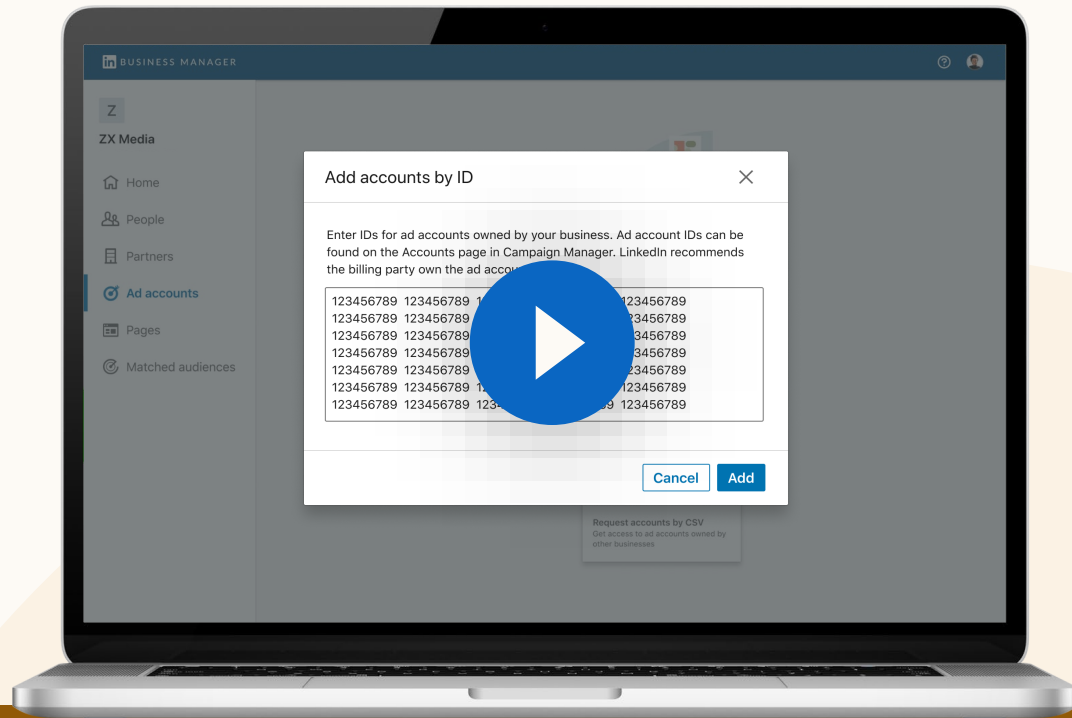
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Add Ad Accounts

Enter Ad Account IDs

Ad Account IDs are 9-digit numerical IDs that can be found in the Accounts tab in [Campaign Manager](#). Go to *Ad Accounts*, and select *Add accounts > Add accounts by ID*.



Tip: Don't forget to include a space between each Ad Account ID when entering in batches..



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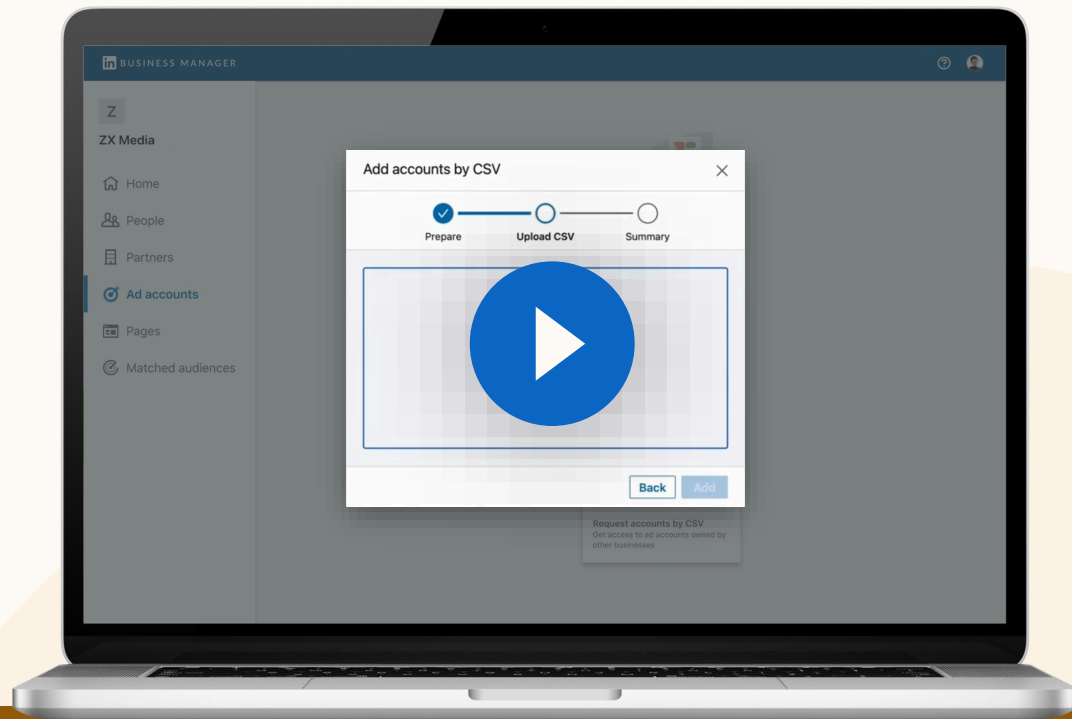
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Add Ad Accounts

Enter IDs in Bulk by CSV

If you'd like to claim *Ad Accounts* in bulk, go to *Ad Accounts* and select *Add accounts* > *Add accounts by CSV*.



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Add Ad Accounts

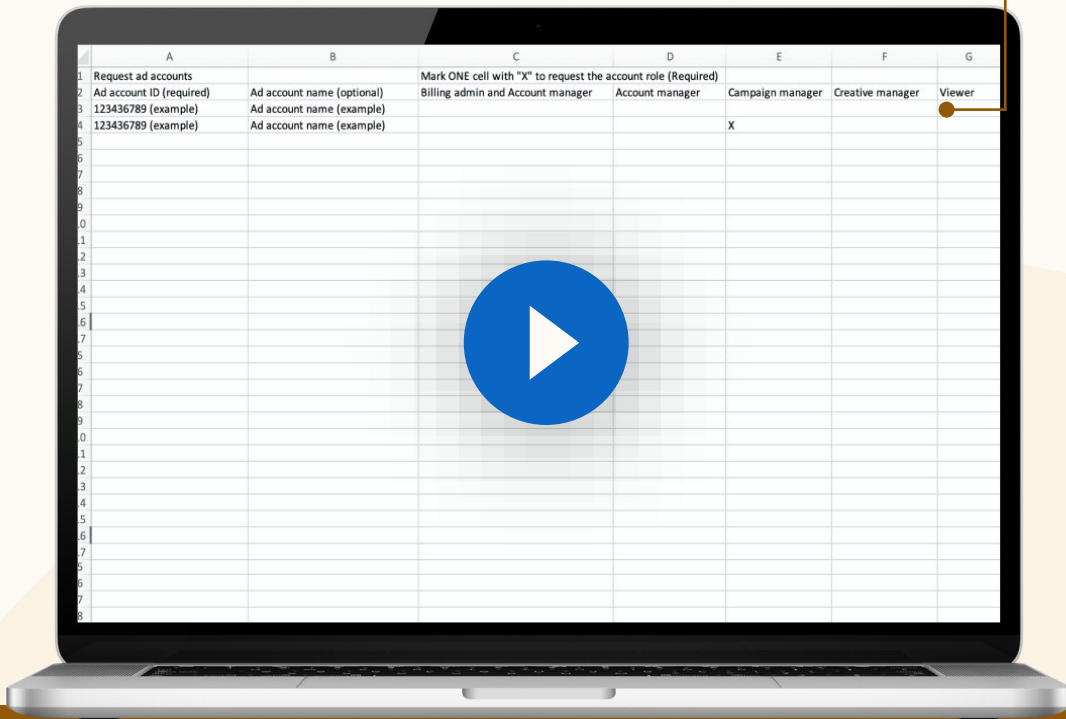
When requesting access, indicate Role

You must use a CSV file and select the [Role](#) your agency needs. Mark an “X” under the desired role. If approved, that’s the highest role you can assign your people on the Account.

If requesting *Ad Account* access, you can [use this language](#) to send to the Ad Account Manager about the request.



Tip: If the *Ad Account* belongs to your client that has Business Manager, don’t use this option. Create a Business Manager *Partnership* first and have the client share *Ad Account* access to you. Use this option if your client does NOT use Business Manager.



Use this email template to request access to Ad Accounts.

Download Template





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Add Pages

Add Pages to Business Manager



How to approve requests



Page Owners	Scenarios	Instructions
Agency will own <i>Pages</i> (Not recommended)	Add <i>Page</i> by searching	 Go to Tutorial
Client will own <i>Pages</i>	Request <i>Page</i> access when Client does not have Business Manager	 Go to Tutorial and Email Template
	Client has Business Manager and shares <i>Page</i> with you	 Go to Tutorial



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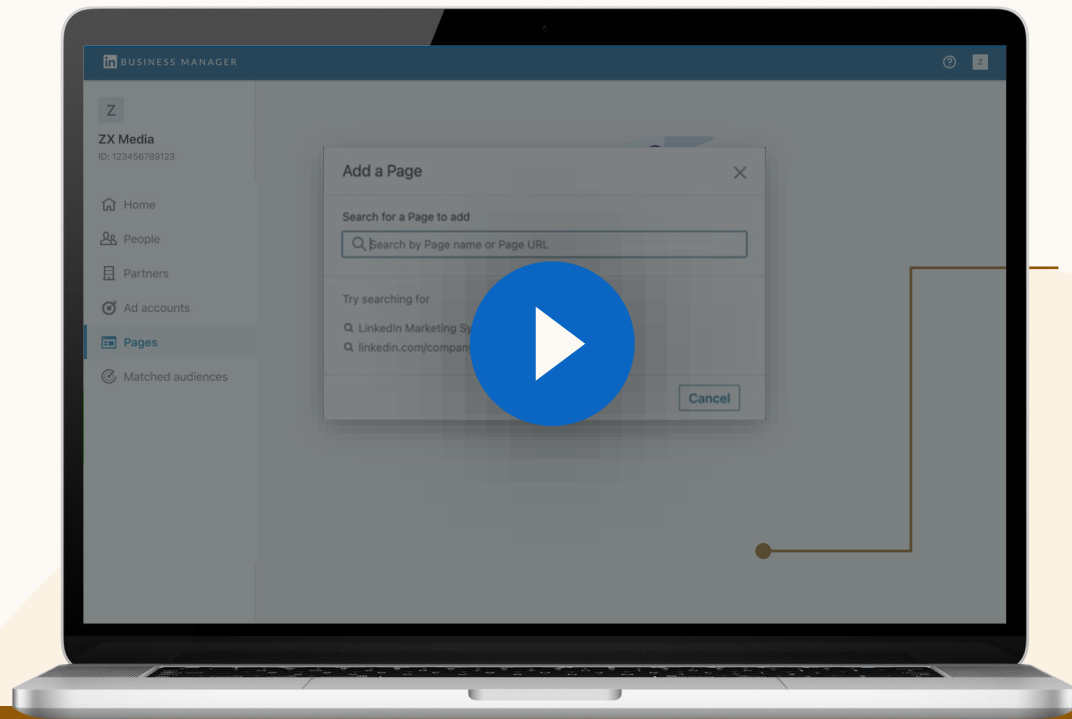
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Add Pages

Add Page as Page Owner

Search for the *Page* you want to add. A *Super Admin* of that *Page* must already be part of your Business Manager before an ownership request can be sent.



Tip: LinkedIn does not recommend that the Agency be the Page Owner.



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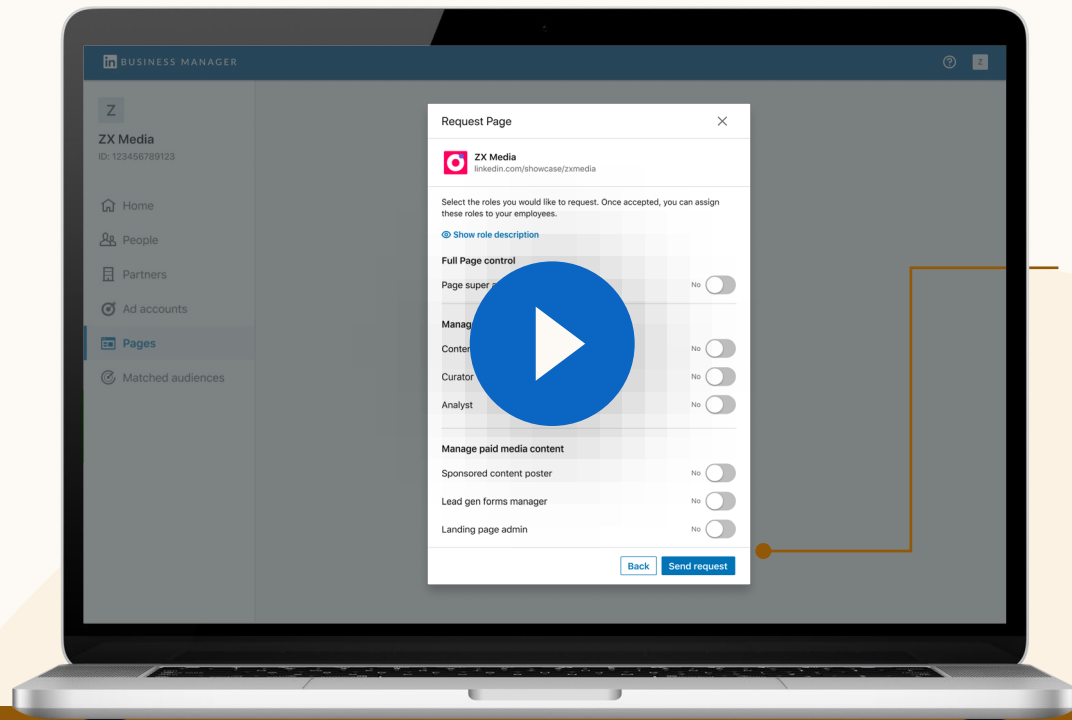
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Add Pages

Request access to Pages



When Requesting Access, you must select *Page* roles you need. [Learn more.](#)



Use this option if you're advertising for your client and they don't have a Business Manager. If your client has a Business Manager, have them share *Page* access with you through a Partnership.



If requesting *Page* access, you can [use this language](#) to send to the *Page Super Admin* about the request.



Use this email template to request access to Pages.

Download Template





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Review Access

Review any person with the “Needs review” role

The Business Role “Needs review” indicates the people that had access to *Ad Accounts* and *Pages* before your agency established ownership of them in Business Manager, but haven’t been invited to Business Manager yet.

Person	Scenarios	Instructions
Existing Employees	Invite them to Business Manager.	 View Tutorial
Former Employees	Remove them so that they lose access to all your <i>Accounts & Pages</i> .	 View Tutorial
Client Employees	If it makes sense, have them create their own Business Manager so you can share <i>Ad Account</i> access with them through a Partnership.	 View Tutorial



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Setup Partnerships

Add a Client as a Partner

When both you and the Client plan to use Business Manager, you will need to set up a Partnership.

Partners can only see and work on the specific *Ad Accounts* and *Pages* shared with them, and cannot reshare them with another Business Manager.

Scenarios	Instructions
Add a Partner	 Go to Tutorial
Share <i>Ad Accounts</i> with Partner	 Go to Tutorial
Share <i>Pages</i> with Partner	 Go to Tutorial



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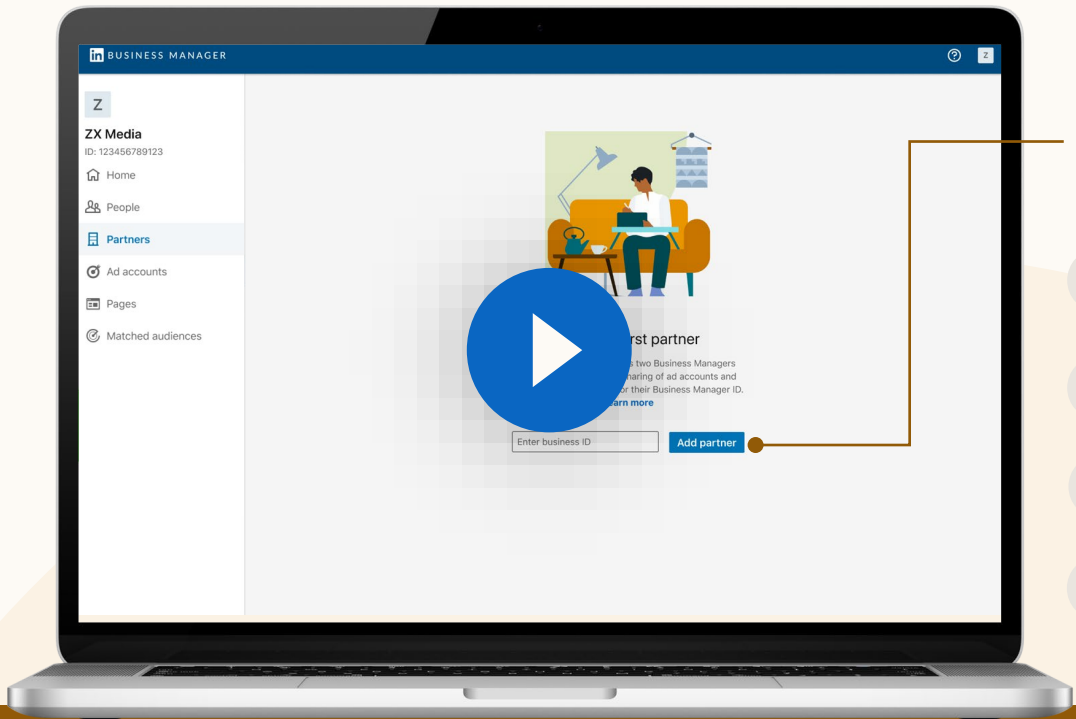


Setup Partnerships

Admins enter the Partner's Business Manager ID



- ✓ Business Manager IDs can be found under the Business Manager name.
- ✓ Both your agency and client must have Business Managers to set up a Business Manager Partnership.
- ✓ *Ad Accounts* and *Pages* are never automatically shared with a Partner.
- ✓ Only *Admins* can add Partners.





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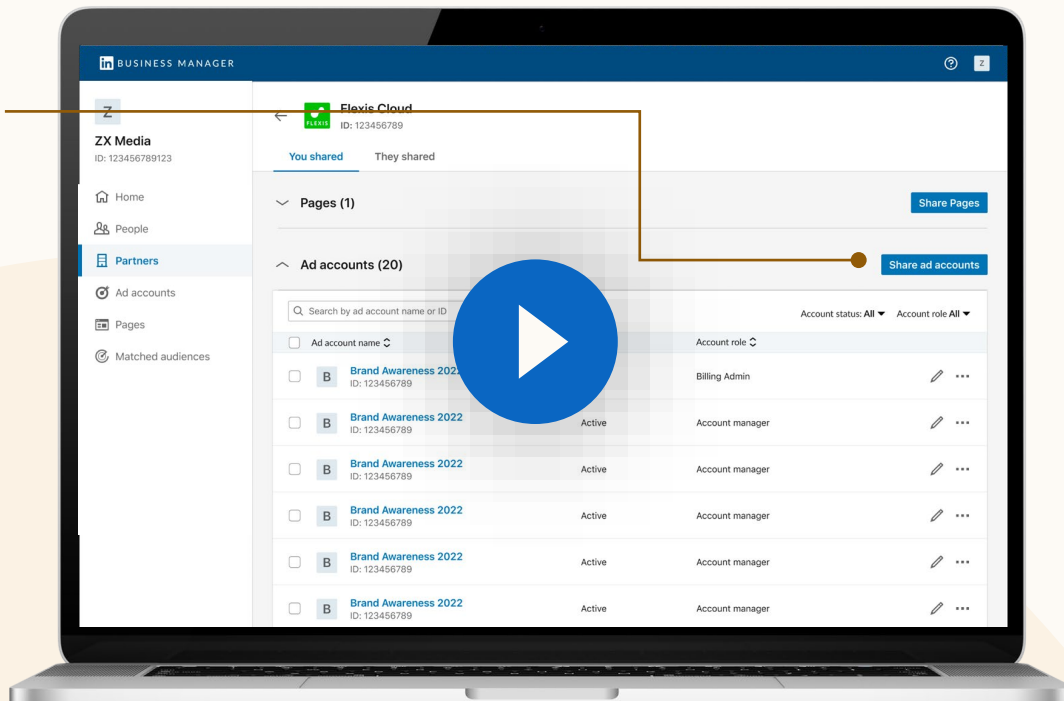


Setup Partnerships

Click on a Partner to start sharing Accounts

Click *Share Ad Accounts* to select which of your Business Manager *Ad Accounts* to share with the Partner.

Partners cannot reshare *Ad Accounts* or *Pages* to another agency.





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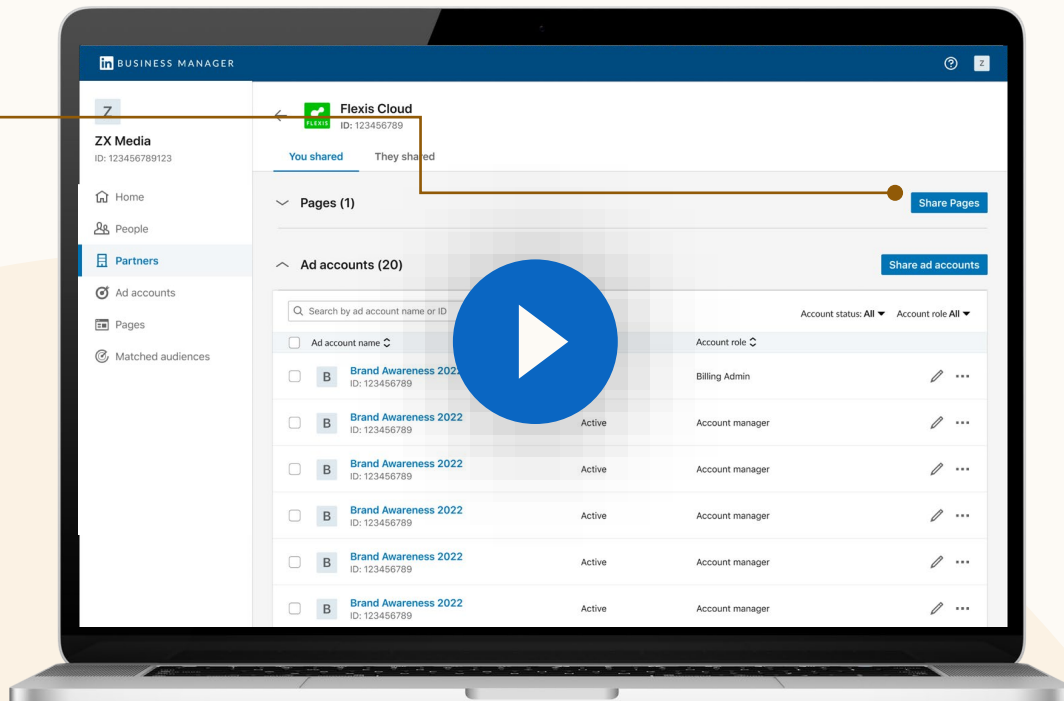


Setup Partnerships

Click on a Partner to start sharing Pages

Click **Share Pages** to select which of your Business Manager *Pages* to share with the Partner.

Partners cannot reshare *Ad Accounts* or *Pages* to another agency.





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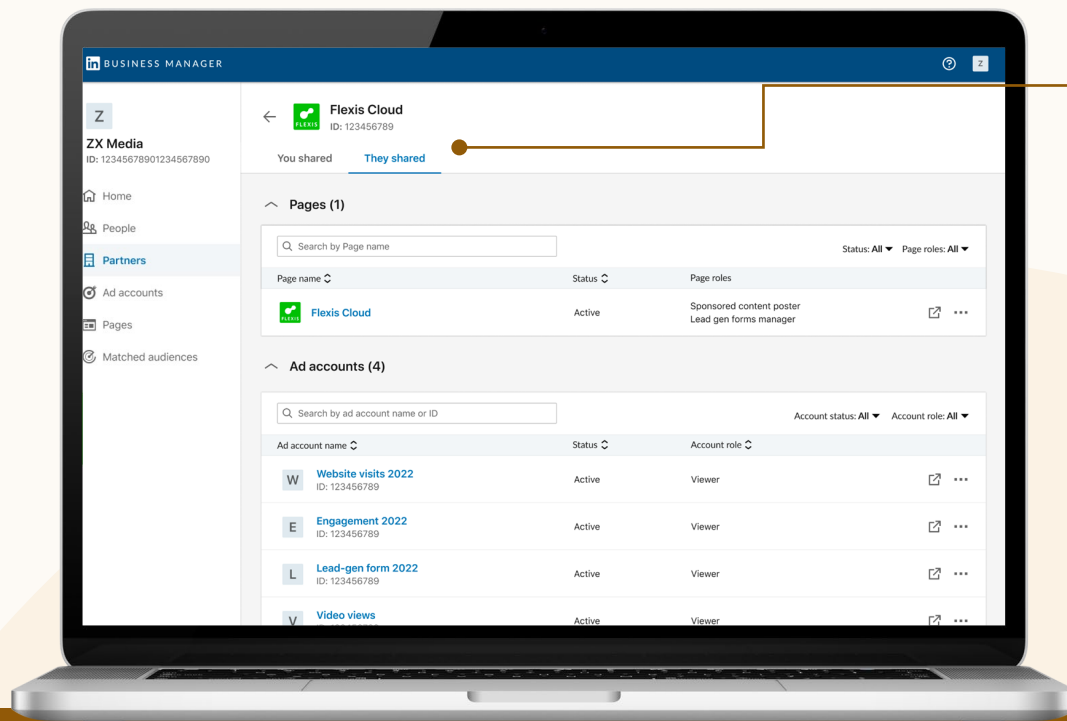
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Setup Partnerships

Partners can then Share Accounts & Pages with you

By clicking the **They Shared** tab from the Partner Profile page, you can see the *Ad Accounts* and *Pages* that your Partner shared with you.

Your *Admins* can now add people to those *Ad Accounts* and *Pages* with the roles specified by your Partner.





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Learn more with these useful resources

[Agency Setup Options](#)

[Brand Setup Options](#)

[Detailed Getting Started Guide](#)

[Account & Page Ownership Overview](#)

[Agency-Client Collaboration Overview](#)

[Audience Sharing Overview](#)

[Business Manager Overview](#)

[Onboarding Overview](#)

[Page Benefits Overview](#)

[Roles & Permissions Overview](#)

[Templates: CSVs and Onboarding Tracker](#)



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Email Templates





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Internal Agency Email

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Agency Account Teams

Subject: Upcoming Onboarding to LinkedIn Business Manager

Hi All,

We're happy to share that LinkedIn is releasing its version of Business Manager to help us centrally control and manage access across all our *Ad Accounts* and *Client Pages*, and we are starting the process of onboarding.

You should receive an email shortly (Subject: Action required: Confirm your email - LinkedIn Marketing Solutions), to join our Business Manager: [\[Enter Business Manager Name Here\]](#). Please check your Spam folder, but let your manager know if you've not received one.

A few key things to note:

- Your access won't be disrupted: after you accept your invitation, your prior Campaign Manager and *Page* permissions will automatically migrate to Business Manager for all *Ad Accounts* and *Pages* we've already or will add.
- Live campaigns, billing, and other setups like insight tags or integrations won't be impacted either.
- All Campaign Manager and *Pages* functionality will remain the same, except for managing permissions, which will occur in Business Manager exclusively by Business Manager Admins or those with Account Manager access on a given *Ad Account*.
- As we start adding our *Ad Accounts* to Business Manager, you may see approval requests come to your email. Please approve any *Ad Accounts* from [\[Enter Business Manager Name Here\]](#).

To learn more, you can check out this [Onboarding Overview](#), or this detailed [Getting Started Guide](#) [\[Consider downloading and attaching\]](#).

Please let me know if you have any questions.



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Version 1

Client Engagement Email

If Client has own Business Manager, and Agency owns Ad Accounts

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Response Requested] Exciting Opportunity to Work Smarter with LinkedIn Business Manager

Hi [Enter Client Name Here].

We're happy to share that LinkedIn is releasing its version of Business Manager and [Enter Agency Name] has begun onboarding [or wants to onboard if you haven't started]. The great news is onboarding is non-disruptive to all our live engagements.

Business Manager is all about making administrative tasks and collaboration between agencies and clients faster and easier, so this will give us even more time to build, execute, and drive ROI for [Enter Client Name].

There are a few considerations we wanted to run by you as we move forward:

- Should [Enter Client Name] have its own Business Manager?
 - **Our recommendation:** Create your own Business Manager. This will allow us to seamlessly share *Ad Accounts*, *Pages*, and *Audiences* across our two Business Managers.
- Should we own the *Ad Accounts* we run on your behalf or should [Enter Client Name]?
 - LinkedIn recommends that the billing party on the *Ad Account* be the owner, so we recommend we own the *Ad Accounts*. <only include the following if agency is aligned> If we ever stop working together, LinkedIn can facilitate transferring the Ad Account to [Enter Client Name].

Here are a couple resources you may find helpful [Recommend downloading and attaching]:

- [Overview of Business Manager](#)
- [Onboarding Overview](#)

Please let us know your thoughts so we can move forward.



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Version 2

Client Engagement Email

If Client has own Business Manager, and owns Ad Accounts

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Response Requested] Exciting Opportunity to Work Smarter with LinkedIn Business Manager

Hi [Enter Client Name Here].

We're happy to share that LinkedIn is releasing its version of Business Manager and [Enter Agency Name] has begun onboarding [or wants to onboard if you haven't started]. The great news is onboarding is non-disruptive to all our live engagements.

Business Manager is all about making administrative tasks and collaboration between agencies and clients faster and easier, so this will give us even more time to build, execute, and drive ROI for [Enter Client Name].

There are a few considerations we wanted to run by you as we move forward:

- Should [Enter Client Name] have its own Business Manager?
 - **Our recommendation:** Create your own Business Manager. This will allow us to seamlessly share *Ad Accounts*, *Pages*, and *Audiences* across our two Business Managers.
- Should we own the *Ad Accounts* we run on your behalf or should [Enter Client Name]?
 - LinkedIn recommends that the billing party on the *Ad Account* be the owner, so we recommend [Enter Client Name] owns the *Ad Accounts* we work on together.

Here are a couple resources you may find helpful [Recommend downloading and attaching]:

- [Overview of Business Manager](#)
- [Onboarding Overview](#)

Please let us know your thoughts so we can move forward.



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Version 3

Client Engagement Email

If Client does not have Business Manager, and Agency owns Ad Accounts

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Response Requested] Exciting Opportunity to Work Smarter with LinkedIn Business Manager

Hi [Enter Client Name Here].

We're happy to share that LinkedIn is releasing its version of Business Manager and [Enter Agency Name] has begun onboarding [or wants to onboard if you haven't started]. The great news is onboarding is non-disruptive to all our live engagements.

Business Manager is all about making administrative tasks and collaboration between agencies and clients faster and easier, so this will give us even more time to build, execute, and drive ROI for [Enter Client Name].

There are a few considerations we wanted to run by you as we move forward:

- Should [Enter Client Name] have its own Business Manager?
 - **Our recommendation:** No. Given the current Business Manager functionality, we believe [Enter Client Name] creating your own Business Manager will just take time and not unlock additional meaningful features for you. We can still benefit from Business Manager even if you don't have one.
- Should we own the **Ad Accounts** we run on your behalf or should [Enter Client Name]?
 - LinkedIn recommends that the billing party on the **Ad Account** be the owner, so we recommend we own the **Ad Accounts**. <only include the following if agency is aligned> If we ever stop working together, LinkedIn can facilitate transferring the **Ad Account** to [Enter Client Name].

Here are a couple resources you may find helpful [Recommend downloading and attaching]:

- [Overview of Business Manager](#)
- [Onboarding Overview](#)

Please let us know your thoughts so we can move forward.



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Version 4

Client Engagement Email

If Client does not have Business Manager, and owns Ad Accounts

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Response Requested] Exciting Opportunity to Work Smarter with LinkedIn Business Manager

Hi [Enter Client Name Here].

We're happy to share that LinkedIn is releasing its version of Business Manager and [Enter Agency Name] has begun onboarding [or wants to onboard if you haven't started]. The great news is onboarding is non-disruptive to all our live engagements.

Business Manager is all about making administrative tasks and collaboration between agencies and clients faster and easier, so this will give us even more time to build, execute, and drive ROI for [Enter Client Name].

There are a few considerations we wanted to run by you as we move forward:

- Should [Enter Client Name] have its own Business Manager?
 - **Our recommendation:** No. Given the current Business Manager functionality, we believe [Enter Client Name] creating your own Business Manager will just take time and not unlock additional meaningful features for you. We can still benefit from Business Manager even if you don't have one.
- Should we own the **Ad Accounts** we run on your behalf or should [Enter Client Name]?
 - LinkedIn recommends that the billing party on the **Ad Account** be the owner, so we recommend [Enter Client Name] owns the **Ad Accounts** we work on together.

Here are a couple resources you may find helpful [Recommend downloading and attaching]:

- [Overview of Business Manager](#)
- [Onboarding Overview](#)

Please let us know your thoughts so we can move forward.



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Version 1

Client Next Steps Email

If Client has own Business Manager, and owns Ad Accounts & Pages

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Action Requested] Next Steps to Onboard to LinkedIn Business Manager

Hi [Enter Client Name Here],

[Enter Agency Name] is actively onboarding to Business Manager now.

Let's work together across the following steps:

1. Please create a Business Manager and share your ID with us (upper left corner of the product) so we can create a Business Manager Partnership with you which will allow us to share *Ad Accounts* and *Pages* with each other. Our ID is [Enter Agency Business Manager ID].
2. Please add your *Ad Accounts* and *Pages* to Business Manager.
3. After doing so, please share them with our Business Manager via our *Partnership*, so we can manage our own people's access. We require the following *Ad Accounts* and *Pages* at the following roles:
 - [Enter Ad Account ID(s) and required role (e.g. Account Manager)]
 - [Enter Page Name(s) or URL(s) and required role(s) (e.g. Sponsored Content Poster)]

To learn more, you can check out this [Onboarding Overview](#), or this detailed [Getting Started Guide](#) [Consider downloading and attaching].



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Version 2

Client Next Steps Email

If Client has own Business Manager, and owns only Pages

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Action Requested] Next Steps to Onboard to LinkedIn Business Manager

Hi [Enter Client Name Here],

[Enter Agency Name] is actively onboarding to Business Manager now.

Let's work together across the following steps:

1. Please create a Business Manager and share your ID with us (upper left corner of the product) so we can create a Business Manager Partnership with you which will allow us to share *Ad Accounts* and *Pages* with each other. Our ID is [Enter Agency Business Manager ID].
2. Please add your *Pages* to your Business Manager. After doing so, please share them with our Business Manager through our Partnership, so we can manage our own people's access. We require the following *Pages* at the following roles:
 - [Enter Page Name(s) or URL(s) and required role(s) (e.g. Sponsored Content Poster)]
3. If you'd like, we can then share *Ad Accounts* with your Business Manager, so you can track them and add your own people to those *Ad Accounts*.

To learn more, you can check out this [Onboarding Overview](#), or this detailed [Getting Started Guide](#) [Consider downloading and attaching].



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Version 3

Client Next Steps Email

If Client does not have Business Manager, and owns Ad Accounts & Pages

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: [Action Requested] Next Steps to Onboard to LinkedIn Business Manager

Hi [Enter Client Name Here],

[Enter Agency Name] is actively onboarding to Business Manager now. You will start seeing requests from [Enter Agency Business Manager Name] to get access to the Ad Accounts and Pages of yours that we support.

[Ask] Account Managers on *Ad Accounts* and *Super Admins* on *Pages* will start getting emails to approve our access. Please approve these requests.

There won't be any impact to your current *Ad Account* and *Pages* experiences. All this does is allow our Business Manager to manage access to these *Ad Accounts* and *Pages* at the roles we've requested.

- This will save you a lot of time, as we can add/remove people from the *Ad Accounts* and *Pages* as people move in and out of our agency without having to ask you to do so.
- This will also promote better governance for you, especially on *Pages*, as if we do stop working together, at any point, you can remove our entire agency's access vs. having to remove each employee one by one.

Please let me know if you have any questions.



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Request Ad Account Access Email

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: Approval of our LinkedIn Business Manager Request

Hi [Enter Client Name Here],

We recently created a LinkedIn Business Manager account.

Business Manager is a new platform that lets us centrally manage all our Accounts, Pages, and People. Business Manager will make it quick and easy for businesses like ours to work together on LinkedIn.

Our Business Manager, [Enter Business Manager Name], just requested access to your **Ad Account**. [Enter Name and/or Account ID]. Account Managers on the Account can approve this request by selecting Business Manager Requests after clicking their profile photo from the upper-righthand corner of Campaign Manager.

[Ask] Could you please approve this request?

All this does is allow our business to manage access to this **Ad Account** at the role we asked for so you don't have to. There's no impact to live campaigns or disruption to your business. At any point, you can remove our access through Campaign Manager one by one or everyone by writing into LinkedIn Support, though please check with us first before doing so.

Please let me know if you have any questions.



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Request Page Access Email

Copy and paste the text to the right. Be sure to swap out or address any text highlighted in the template.

To: Main Client Contact

Subject: Approval of our LinkedIn Business Manager Request

Hi [Enter Client Name Here],

We recently created a LinkedIn Business Manager account.

Business Manager is a new platform that lets us centrally manage all our Accounts, Pages, and People. Business Manager will make it quick and easy for businesses like ours to work together on LinkedIn.

Our Business Manager, [Enter Business Manager Name], just requested access to your **Page**. [Enter Name and/or Account ID]. **Super Admins** on the **Page** can approve this request by selecting the Admin Tools dropdown and clicking Manage Admins.

[Ask] Could you please approve this request?

All this does is allow our business to manage access to this **Page** at the role you specified to save you time. There's no other impact to your **Page**. At any point, you can remove our access one by one through **Pages** or by writing into LinkedIn Support. Please let us know before doing so.

Please let me know if you have any questions.



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Thank You!

If you have any questions and work with an assigned LinkedIn sales representative reach out to them. You may be eligible for additional Business Manager support. Otherwise, check out our [Help Center](#).

