

CRM Sync

Helping agencies unlock full-funnel visibility and prove ROI faster



What is CRM Sync?

CRM Sync connects your client's CRM platform ([HubSpot](#), [Salesforce](#), [Microsoft Dynamics](#)) directly to LinkedIn, enabling advertisers to link their **pipeline, lead quality, revenue data and lifecycle stages** with LinkedIn Ads to close the loop from click to conversion to revenue.

*CRM Sync offers a fast, lightweight setup—often completed in **under an hour**—making it an accessible first step for agencies.*

Why does it matter for agencies?

Most agencies report platform metrics like impressions, clicks, and conversions, but **clients increasingly expect end-to-end proof of value.**

- Which leads became qualified?
- Which campaigns generated opportunities?
- What revenue did LinkedIn influence or drive?

*CRM Sync brings these downstream signals directly into LinkedIn reporting, enabling agencies to deliver **clear, revenue-focused insights** without complex technical integrations.*

Key benefits of CRM Sync for agencies



Full-funnel measurement from lead to revenue

CRM Sync maps CRM lifecycle stages back into LinkedIn, allowing agencies to attribute **opportunities, pipeline value, and closed/won revenue** to specific campaigns and audiences.



Improve optimization with real business outcomes

Access to deeper funnel signals—such as opportunity stage progression—helps agencies make **smarter bid, budget, and audience decisions** that reflect true business performance.



Strengthen retention by proving ROI clearly

Agencies can demonstrate not only that LinkedIn generated leads but how those leads contributed to **pipeline, revenue, and sales cycles**—supporting stronger client conversations and renewals.

Ideal use cases for agencies

✓ Agencies managing SMB, self-serve, or scaled clients

CRM Sync is a strong fit when agencies support clients who need quick, low-lift measurement without complex engineering work. It can be set up relatively quickly and gives clients immediate visibility into downstream performance beyond leads.

✓ Agencies providing business impact to clients

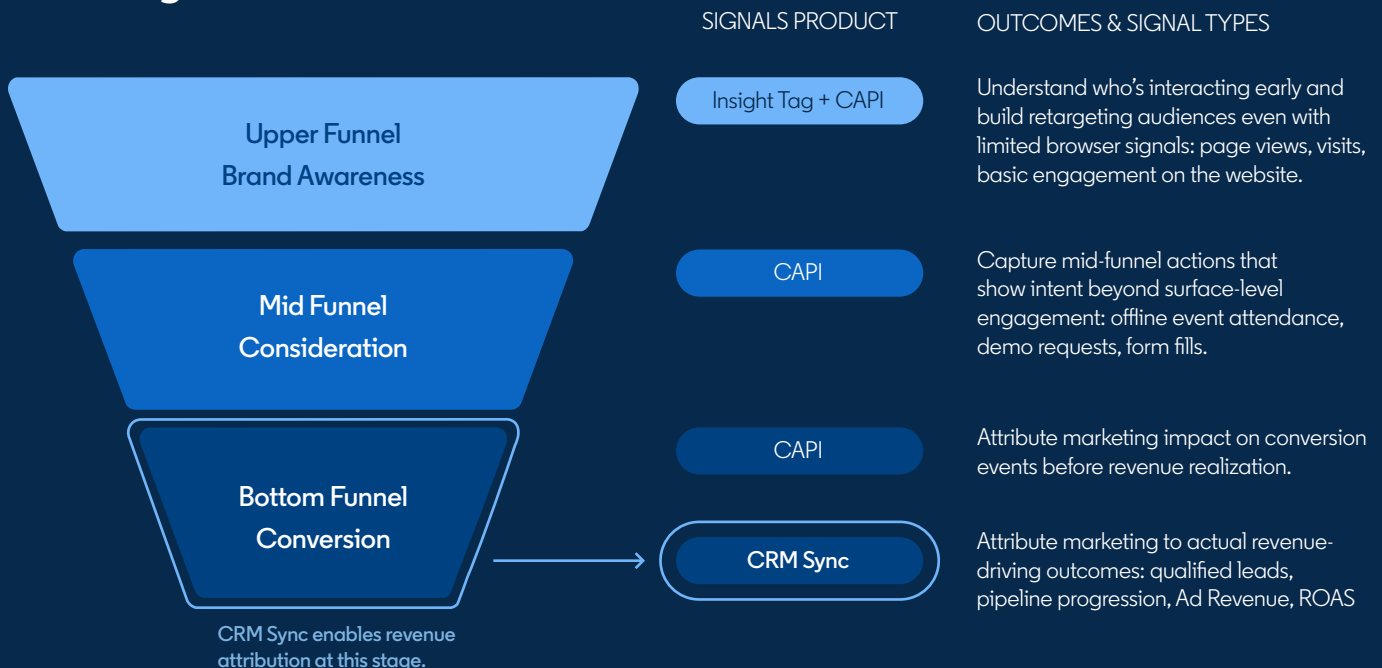
CRM Sync helps agencies demonstrate clear business outcomes to justify spend, optimize strategy, or support renewals and budget conversations. CRM Sync surfaces pipeline and revenue influence so agencies can move beyond CTRs and CPLs to performance tied to real business results.

How CRM Sync works

- 1** A secure connection links your CRM (Hubspot, Salesforce, Microsoft Dynamics) to LinkedIn.
- 2** Selected CRM data (contacts, companies, lifecycle stages) syncs securely.
- 3** LinkedIn matches this data to member and company profiles.
- 4** Reporting shows pipeline and revenue influence.
- 5** Campaigns can be manually optimized using real bottom-funnel outcomes.

Coming soon: CRM Sync qualified leads can be used directly in Campaign Manager for campaign optimization.

Marketing Funnel



What CRM Sync is NOT

- ⊗ NOT a replacement for CAPI (CAPI captures and helps improve campaigns using conversion signals; CRM Sync shows how those campaigns drive pipeline and revenue.)
- ⊗ NOT a way to access your client's CRM data inside LinkedIn; data only appears as aggregated, anonymised reporting metrics.
- ⊗ NOT a heavy technical integration (no developer needed).

How to set it up

1

Connect CRM to LinkedIn

Follow the instructions provided by the CRM provider (HubSpot, Salesforce, or Microsoft Dynamics). Find more information about connecting LinkedIn to each CRM below.

HubSpot



Microsoft
Dynamics 365

2

Map key lifecycle stages & fields

Define lifecycle stages and ensure alignments for MQL → SQL → Opportunity → Closed/Won.

3

Verify data flow & attribution

Once the sync is active, pipeline, opportunity, and revenue data will populate in LinkedIn reporting.

