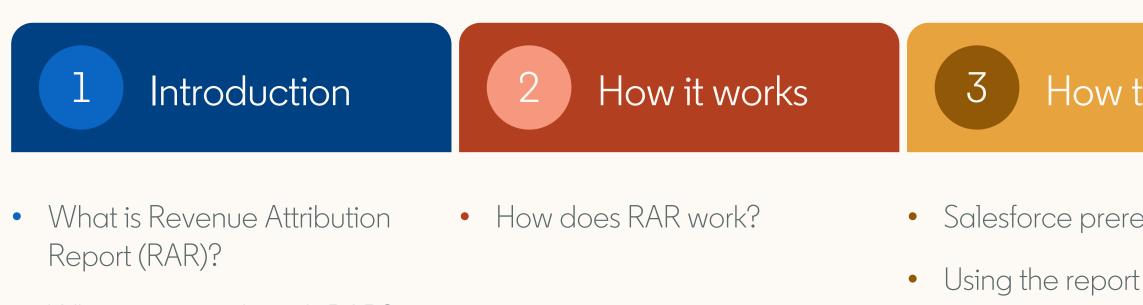


Getting started with: LinkedIn Revenue Attribution Report



What you will learn in this guide



• What can you do with RAR?

TIP: Use the presentation mode for an interactive experience

How to set it up

FAQ

- Salesforce prerequisite checklist How does RAR define

- engagement?
- How is my data stored and protected by LinkedIn?
- How are objects and fields shared and used from SFDC?
- What information & permissions do I need to connect my CRM?

• Useful links

Resources

5



Introduction

1 Introducing Revenue Attribution Report

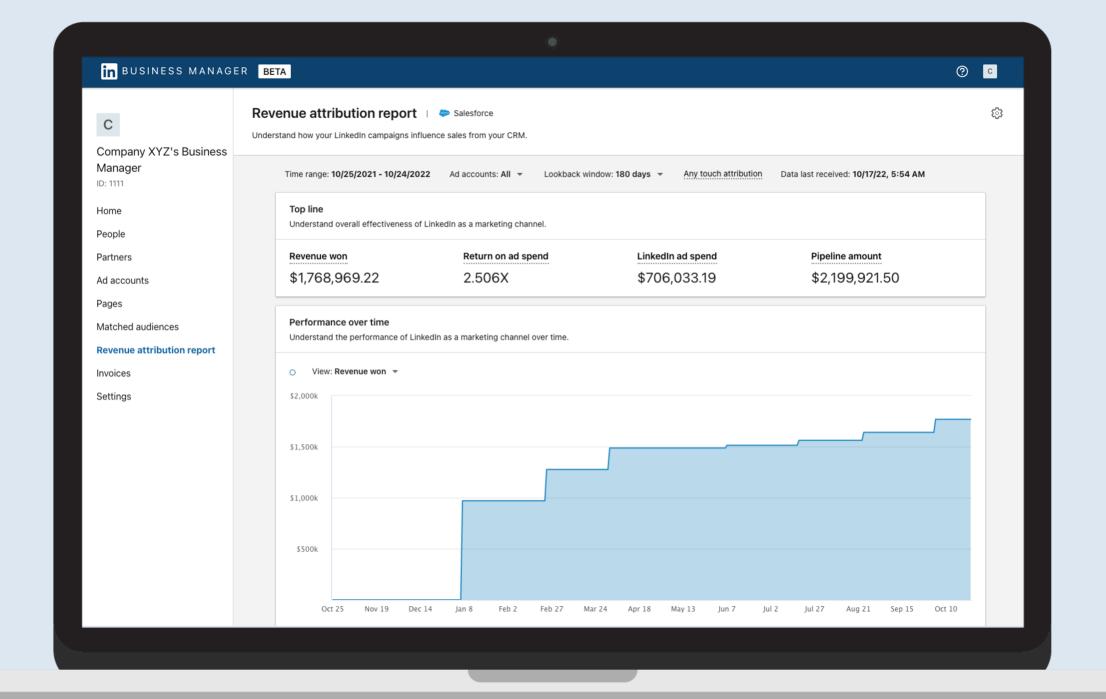


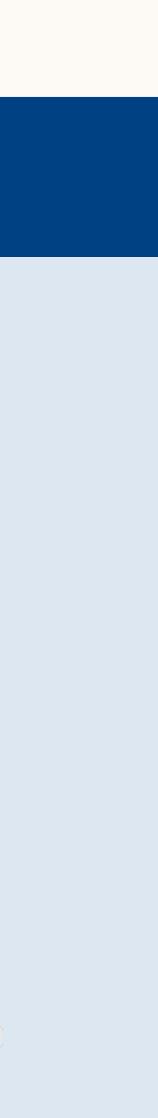


What is Revenue Attribution Report?

A new report enabling you to demonstrate how your marketing efforts are influencing revenue for your business.

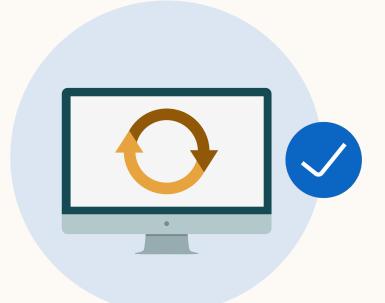








What can you do with Revenue Attribution Report?



Sync CRM data to understand how metrics are influenced by LinkedIn marketing down the funnel as they convert to closed won opportunities. FAQ

Resources

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View reports directly from your Business Manager Ad Accounts to show how LinkedIn marketing impacts sales metrics.



2 How does Revenue Attribution Report work?



How does Revenue Attribution Report work?

- Revenue Attribution Report sits within Business Manager.
- All you need to do is activate your Business Manager account, sync your CRM, and begin!





If you haven't already, create your Business Manager <u>here</u> (<u>best practices</u>).



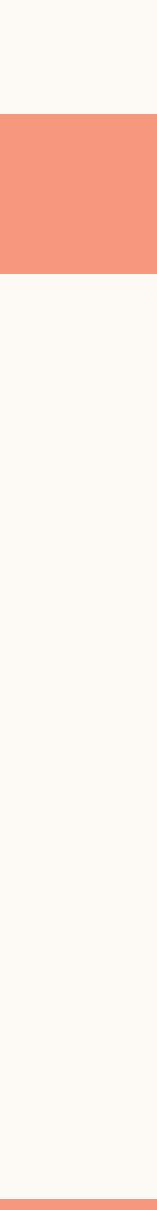
Leverage the <u>Salesforce Prerequisites Checklist</u> to ensure your CRM has the appropriate settings.



Sync your CRM to Business Manager.



Use Revenue Attribution Report to track key metrics influenced by LinkedIn.





3 How to set up Revenue Attribution Report

FAQ

Resources



Revenue Attribution Report requires a Business Manager

Business Manager onboarding is simple! Add your people, ad accounts, and pages <u>here</u>.



Tip: For additional best practices on how to set up Business Manager, leverage <u>this resource</u>.

FAQ



in business manager

Request Business Manager account

Business Manager account name

This is the name your employees and partners will use to identify your business. Learn more

Your work email

This should be the email you use for work and does not need to match your personal LinkedIn profile. We will send all communications regarding your Business Manager account to this email.

How will you primarily use this Business Manager?

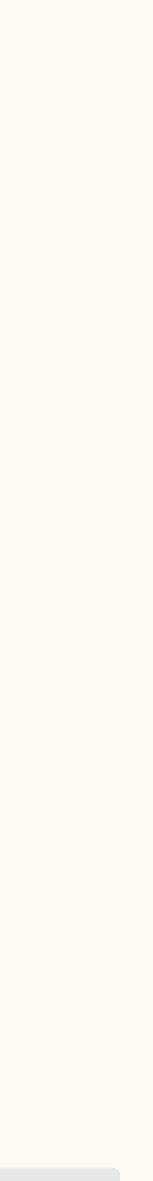
	Manage	my	business	
/		,		

Manage clients or other businesses

Business logo (Optional)

JPG or PNG; up	Upload	
	Submit request	









Salesforce Prerequisites Checklist

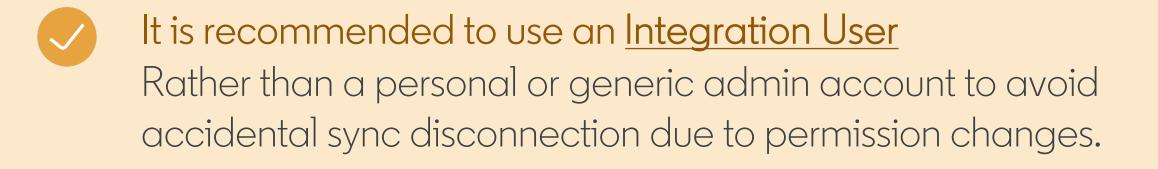
Revenue Attribution Report requires a Salesforce CRM* sync.



Tip: Set password to <u>never expire</u>. Otherwise you will need to reconnect your CRM when your password expires to continue using RAR. You'll need Salesforce Admin credentials in order to set password policies.

*Supported Salesforce editions: Enterprise, Performance, Unlimited, or Developer edition *Salesforce: Professional Edition requires API Access (may require an additional fee, contact Salesforce support for more information)





- Ensure your Salesforce Profile has the API Enabled box checked.
- Enable CRM sync for all features using credentials with a permission level of "<u>View</u>" (or Read-Only) On all objects and fields as listed here.
- Ready to connect your CRM! You'll need your SFDC username, password, security token, and environment URL

1. Connect CRM

Head to the Revenue Attribution Report Tab to connect your CRM. Salesforce CRM is the only available CRM at this time.

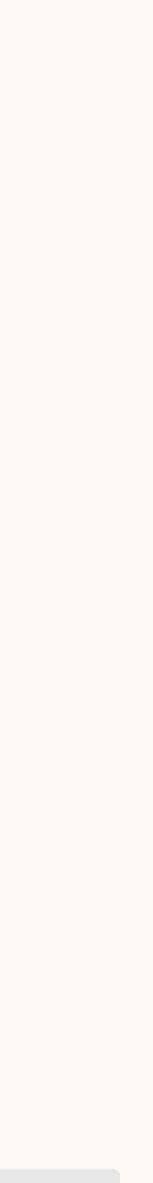


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M MA Test BM Account ID: 2805 Home People Partners	CRM Connection		
Ad accounts Pages Matched audiences Revenue attribution report Settings	Connect CRM Connect your Business Manager account to a Salesforce CRM[BETA] to receive a report attributing LinkedIn marketing efforts to revenue. See sample report		
	Help center Certified partners Privacy & terms ▼ Linked in LinkedIn Corporation © 2022		



in business manag	ER			
		Connect Your Salesforce CRM	1 ×	
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MA Test BM Account				
ID: 2805		Password *		
Home		Show		
People		Security Token *		
Partners		Where do I find my security token?	Show	
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ettings		account will have access to the reve up to 48 hours for data to appear.	enue attribution report. It can take	
			Cancel Connect	
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			Linked in LinkedIn Corporation © 2022	



2. Provide Credentials

In order to connect your Salesforce CRM you must provide your Salesforce Username and Password, Security Token, and <u>Environment URL</u>.



Tip: Your Salesforce security token can be found and reset in your Salesforce Personal Set Up > My Personal Information > Reset Your Security Token

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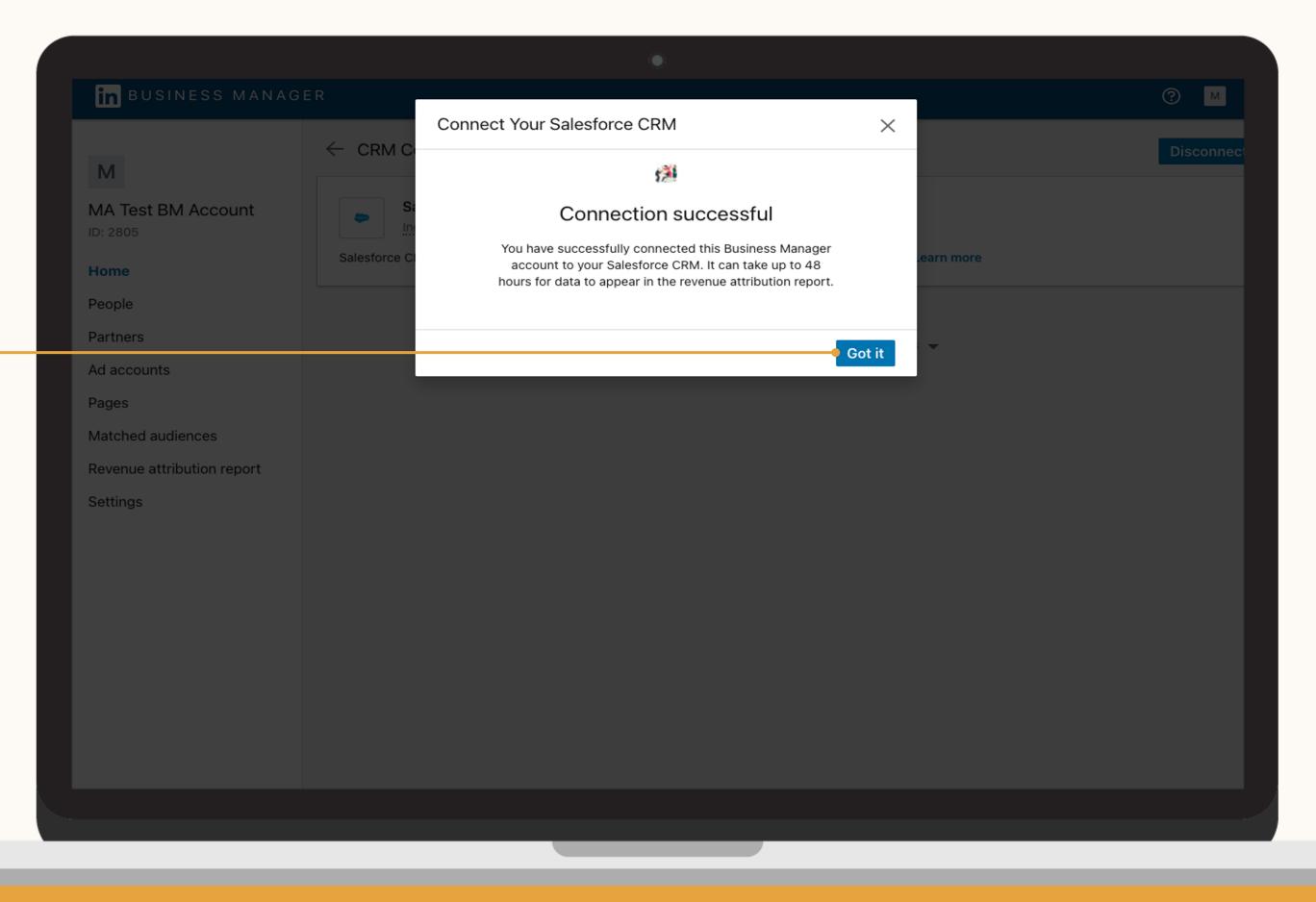
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3. Success!

Once you have successfully connected your CRM, it can take up to 72 hours for data to appear.



Tip: Learn about LinkedIn's Data Handling and Privacy Policies <u>here</u>.









4. CRM fields

To ensure the report metrics are accurate, navigate to **Settings** to confirm which CRM opportunity field you use.



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Using Revenue Attribution Report







What metrics are available in the Revenue Attribution Report?

	Revenue won	The sum of closed-wor
Top line	Return on ad spend (ROAS)	Revenue won divided k
metrics	LinkedIn ad spend	The sum of ad spend a
	Pipeline amount	Dollar amount of open
	Leads	Total leads influenced
Funnel metrics	Open opportunities	Total open opportunitie
	Closed won opportunities	Total closed won oppo
	Lead conversion rate	The number of influenc
Conversion	Opportunity win rate	Number of influenced o
metrics	Average deal size	Average amount acros
	Average days to close	Average days to close



on opportunities influenced by LinkedIn marketing efforts.

- l by LinkedIn ad spend.
- across Ad Accounts owned by your Business Manager account.
- n opportunities influenced by LinkedIn marketing.
- by LinkedIn marketing.
- ies influenced by LinkedIn marketing.
- ortunities influenced by LinkedIn marketing.
- ced converted leads divided by the number of total influenced leads.
- closed won opportunities divided by the number of influenced closed opportunities.
- oss all closed won opportunities influenced by LinkedIn marketing.
- e across all closed won opportunities influenced by LinkedIn marketing.

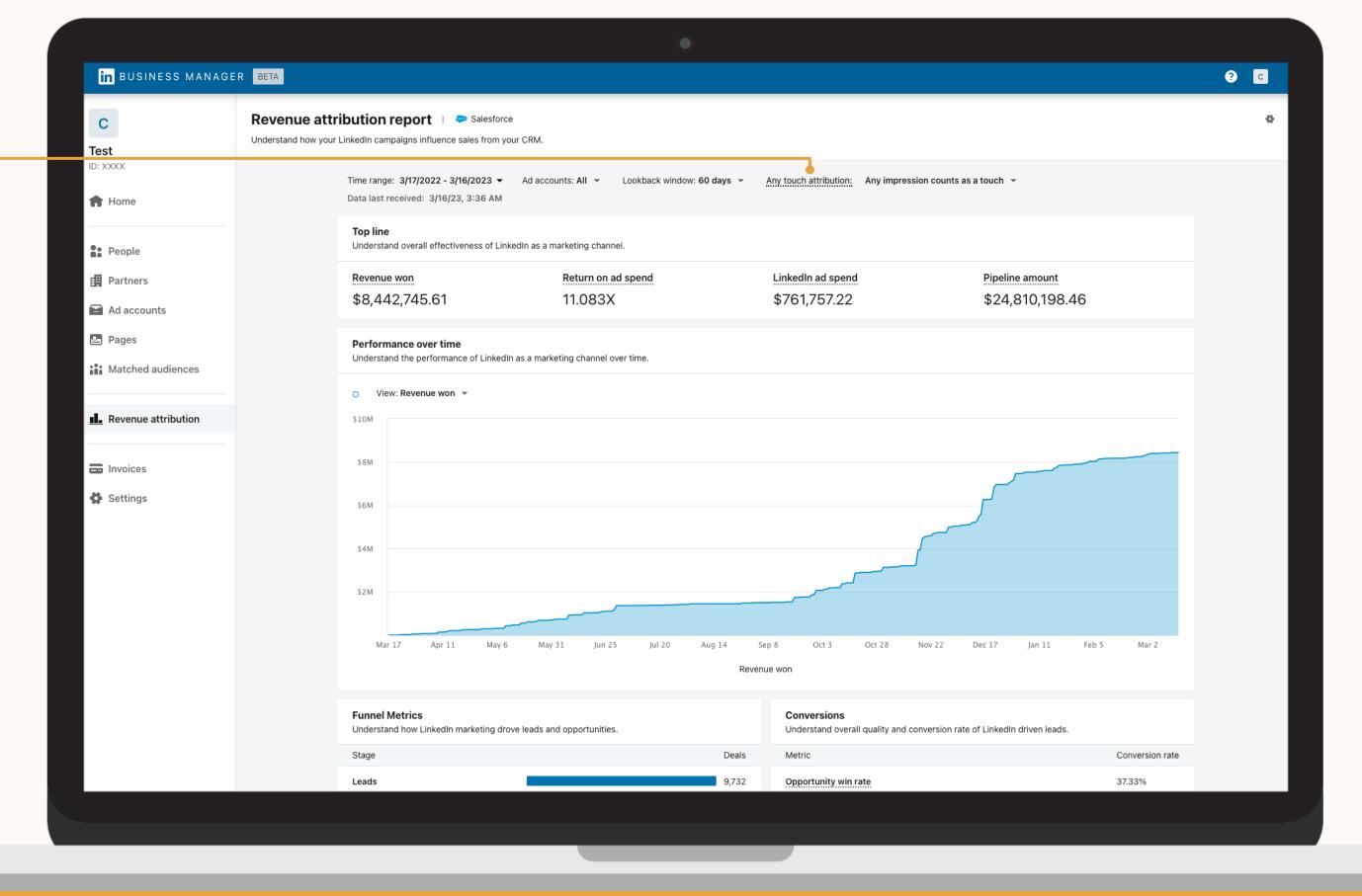


Metrics: Attribution Models

Available attribution models

Currently Revenue Attribution Report reports on any touch attribution.

Any touch attribution is defined as leads who have engaged with LinkedIn marketing activities within the given lookback window.



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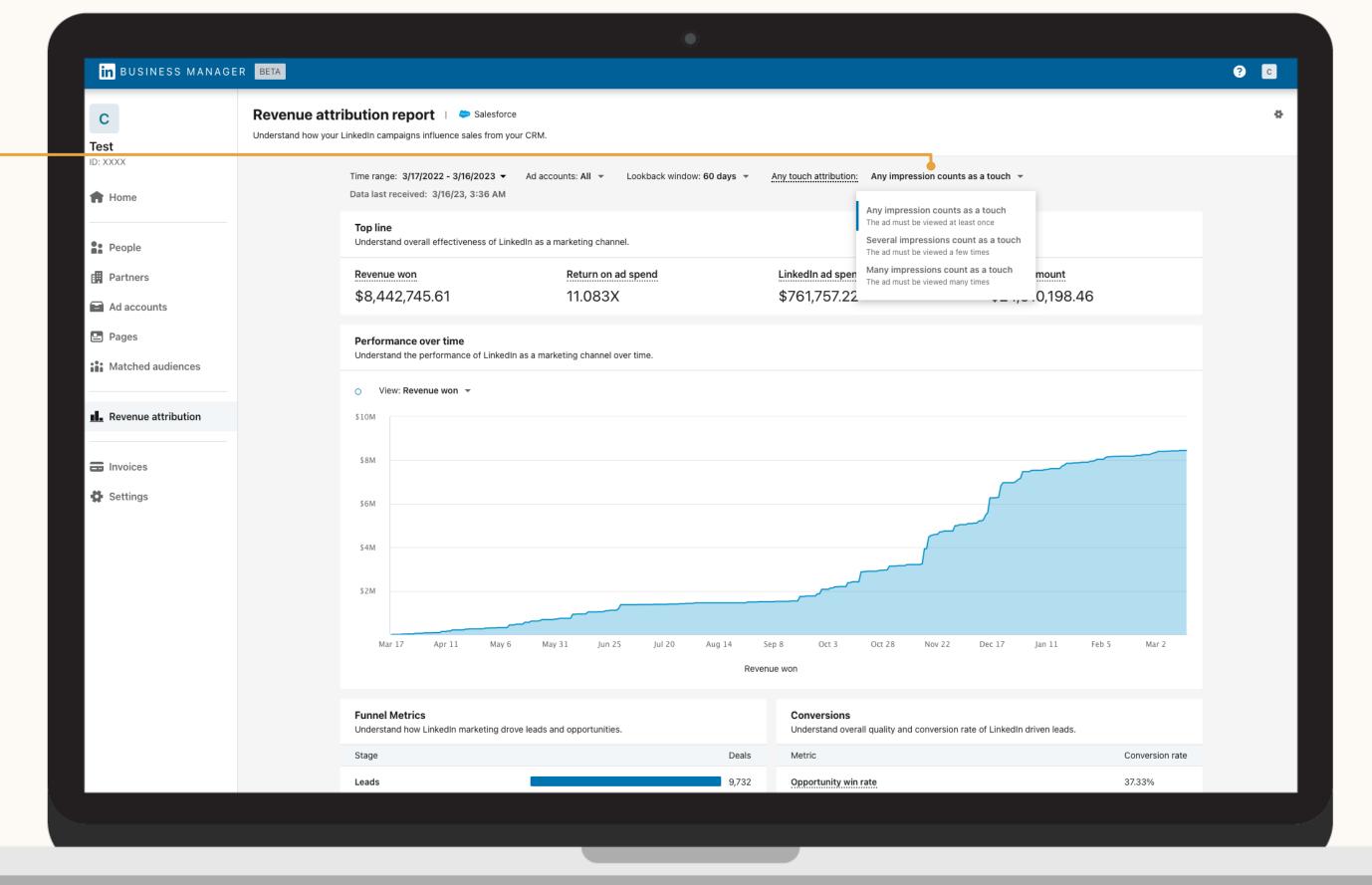




Metrics: Attribution Models

Toggle between thresholds –

Choose between any, few, and many impressions you want to count before attributing credit to LinkedIn influenced.



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Reporting: Filter by Ad Account

Filter your report by ad account

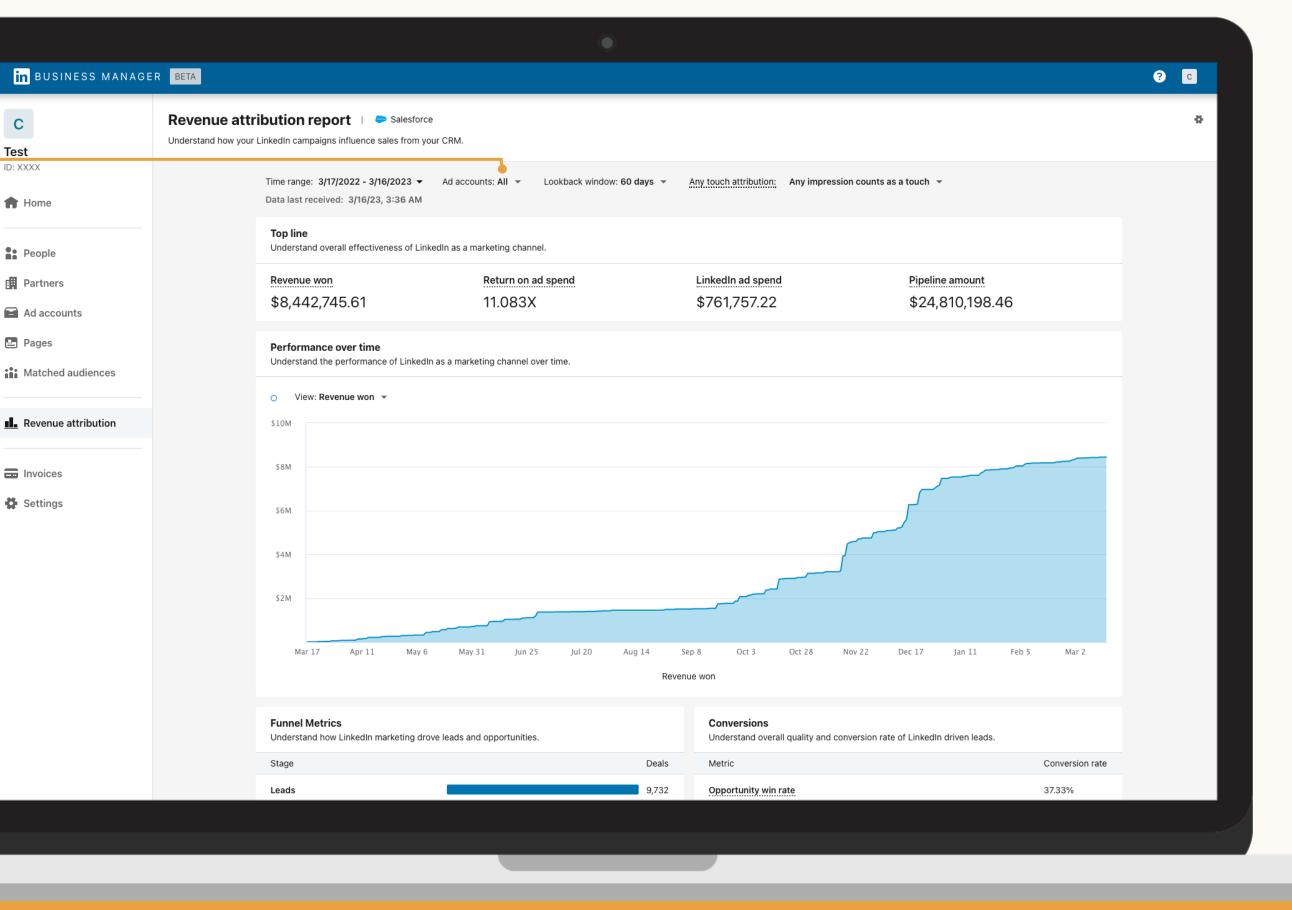
Select the drop down next to "Ad Accounts" at the top of the dashboard to break down your report by one or multiple ad accounts!



Tip: This feature is great for further evaluating marketing impact across BUs, different marketing strategies, and more!

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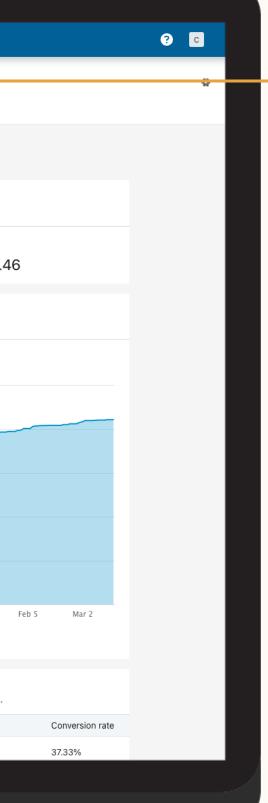






Reporting: Custom Lookback Window

in business manage	ER BETA
C Test	Revenue attribution report Salesforce Understand how your LinkedIn campaigns influence sales from your CRM.
ID: XXXX	Time range: 3/17/2022 - 3/16/2023 - Ad accounts: All - Lookback window: 60 days - Any touch attribution: Any impression counts as a touch - Data last received: 3/16/23, 3:36 AM 30 days
People	Top line 60 days Understand overall effectiveness of LinkedIn as a marketing chain 60 days Revenue won Return on 90 days LinkedIn ad spend
Ad accounts	\$8,442,745.61 11.083× ¹⁸⁰ days \$761,757.22 \$24,810,198.4
Pages Matched audiences	Performance over time Understand the performance of LinkedIn as a marketing channel over time.
Revenue attribution	O View: Revenue won ▼
	\$8M
Settings	S6M
	S4M
	\$2M
	Mar 17 Apr 11 May 6 May 31 Jun 25 Jul 20 Aug 14 Sep 8 Oct 3 Oct 28 Nov 22 Dec 17 Jan 11 Revenue won
	Funnel Metrics Conversions Understand how LinkedIn marketing drove leads and opportunities. Understand overall quality and conversion rate of LinkedIn driven leads.
	Stage Deals Metric
	Leads 9,732 Opportunity win rate



Adjust your lookback window

See how your marketing impacts deal size and other funnel metrics by adjusting your lookback window to 30, 60, 90, or 180 days.

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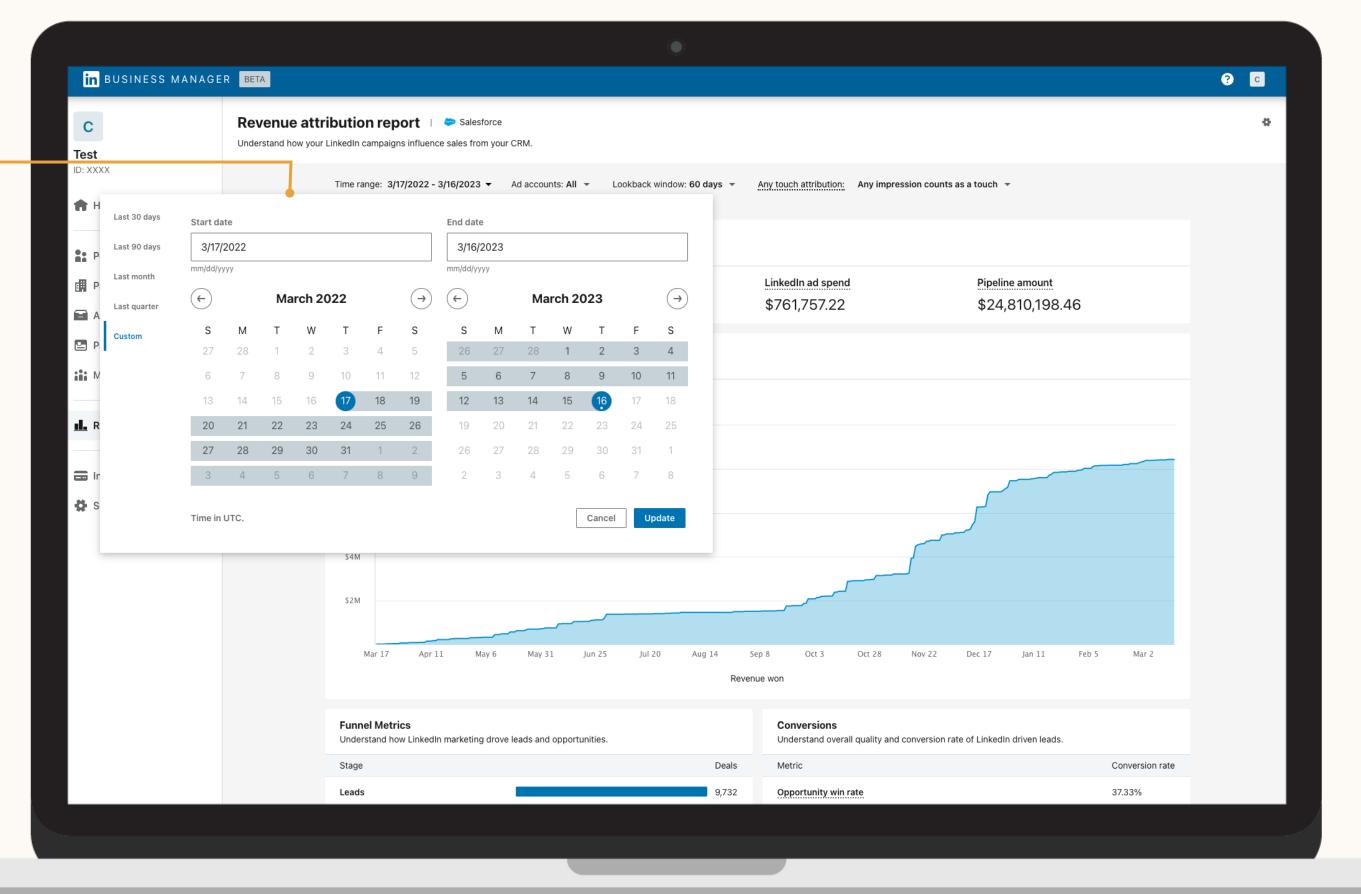
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Reporting: Custom Time Range

Adjust the time range of the report

- The default time range of the report is set to the last year of CRM data and ad spend.
- Select a custom time range to view your metrics, from the last week, quarter, or whichever time frame makes sense for your tracking purposes.



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How are leads tracked?

Leads influenced by LinkedIn marketing can be tracked down the funnel as they convert to closed won opportunities.



Tip: Leads influenced by LinkedIn marketing can be tracked down the funnel as they convert to closed won opportunities.





Leads in RAR are defined as CRM contacts that are tied to an opportunity.



Leads influenced by LinkedIn marketing are leads that have engaged with your LinkedIn marketing activities within the attribution window (default: 180 days)



Engagement refers to leads who have viewed, clicked, liked, shared or otherwise engaged with your LinkedIn marketing activities.



4

Frequently Asked Questions



How does RAR attribution work today?

Currently, Revenue Attribution Report reports on any touch attribution.

Any touch attribution is defined as CRM leads who have engaged (e.g., viewed, clicked, liked, or shared) with LinkedIn advertising in a given lookback window before a deal closes. Salesforce opportunities are matched to LinkedIn marketing data based on the engagement of the lead tied to your opportunity in your CRM. If that CRM lead has engaged with your LinkedIn marketing in the lookback window you have selected (30, 60, 90, 180 days) before the opportunity is closed/won, we attribute that revenue as influenced by your LinkedIn marketing.

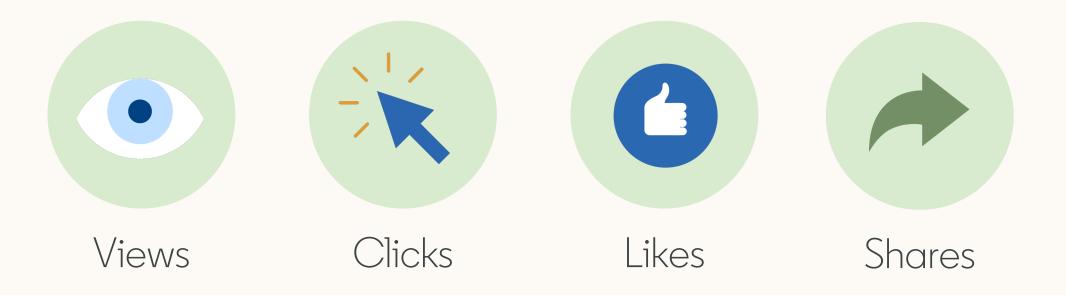


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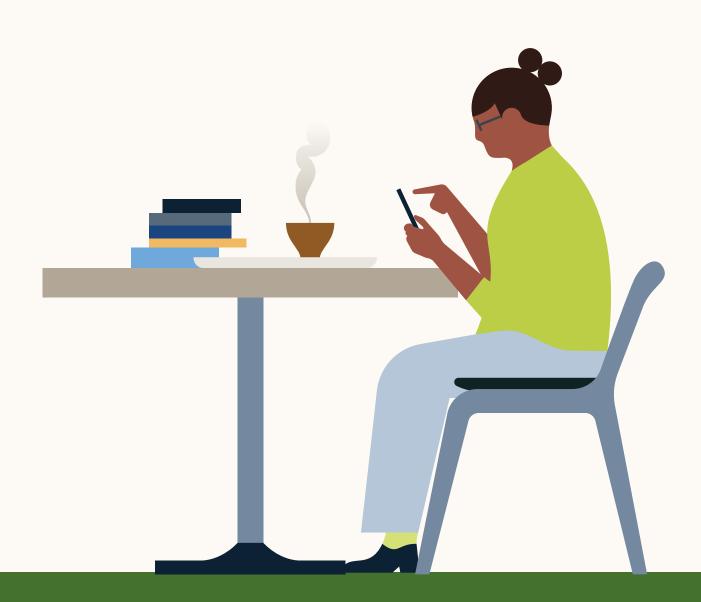
How does RAR define engagement?

Engagement is defined as views, clicks, likes or shares with LinkedIn marketing activities.











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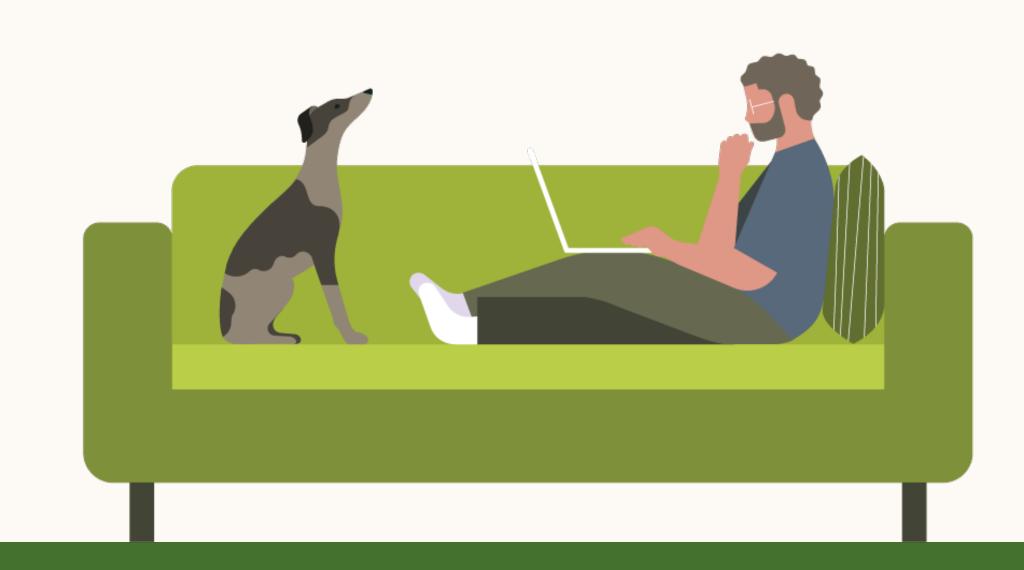
Introduction

How is my data stored and protected by LinkedIn?

When you connect your Customer Relationship Management (CRM) platform with Business Manager, personal data from your CRM is stored securely with data isolation, secure data access, and more.

For more information, please visit our Help Center article on <u>CRM data handling and</u> <u>protection for Revenue Attribution Report</u>.

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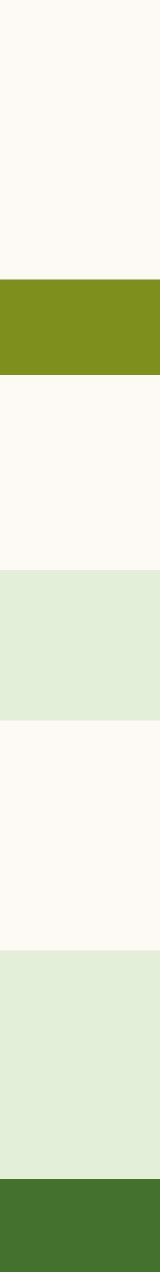


How are objects and fields shared and used from SFDC?

Object	Fields	Usage
Lead	Id, City, Company, ConvertedAccountId, ConvertedContactId, ConvertedDate, ConvertedOpportunityId, Country, CreatedDate, Email, FirstName, Industry, IsConverted, IsUnreadByOwner, LastActivityDate, LastName, LastReferencedDate, LastViewedDate, LeadSource, OwnerId, Phone, State, Status, Street, Title, Website, LastModifiedDate	Match CRM Leads to Contact level data in Business Manager
Contact	Id, AccountId, CreatedDate, Department, Description, Email, Fax, FirstName, LastActivityDate, LastName, LastModifiedDate, LastReferencedDate, LastViewedDate, LeadSource, MailingStreet, MailingCity, MailingCountry, MailingState, Name, Phone, Title	Match CRM Contacts to Leads
Account	Id, Name, Website, AnnualRevenue, NumberOfEmployees, Phone, Industry, Type, BillingStreet, BillingCity, BillingState, BillingCountry, BillingPostalCode, CreatedDate, LastModifiedDate, Ownerld, Description, Fax,ParentId,ShippingCity, ShippingCountry, ShippingPostalCode, ShippingState, ShippingStreet, LastReferencedDate, LastViewedDate, Rating, TickerSymbol, Ownership	Match CRM Accounts to Accounts in Business Manager
Opportunity	Id, AccountId, Amount, CloseDate, CreatedDate, IsClosed, IsWon, LastActivityDate, LastReferencedDate, LastViewedDate, LeadSource, Name, OwnerId, StageName, Type, LastModifiedDate	Evaluate what CRM Accounts/Contacts are associated with Open Opportunities and owners Enable ROI reporting to help show impact of LinkedIn Advertising on Sales Performance

Data is used for read only purposes. Please ensure API access is enabled in your CRM.





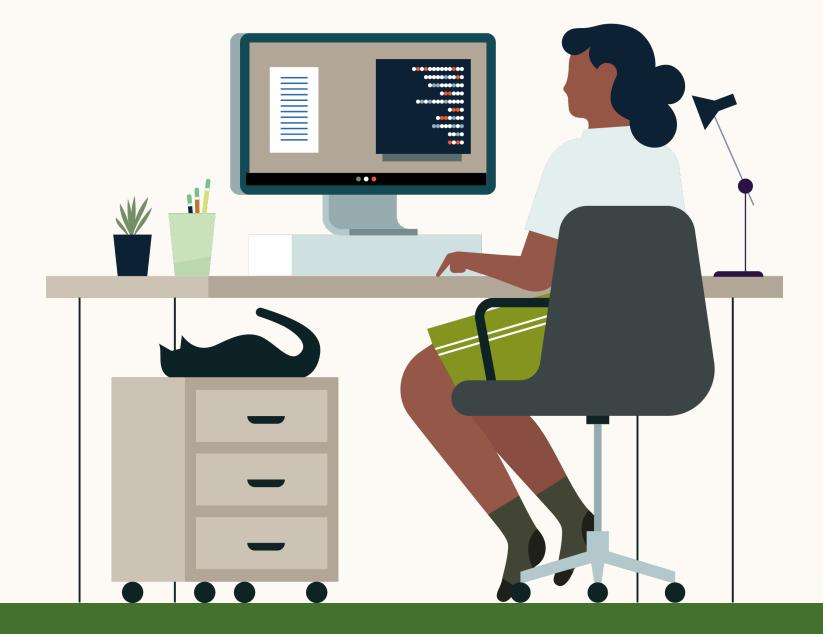


What information & permissions do I need to connect my CRM?

Please leverage our <u>Salesforce Prerequisite Checklist</u>.









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5 Helpful resources





Learn more with these useful resources

- <u>CRM Data Handling and Protection in Revenue Attribution Report</u>
- RAR metric definition from CRM data
- RAR CRM data imports from CRM data

FAQ

Resources





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Please reach out to your LinkedIn sales contact with any questions or feedback.





6 Appendix



How do I check if my Salesforce Profile has API access enabled?

- 1. Click the Avatar on the top right corner
- On the left hand rail, "My Personal Information" → "Advanced User Details"
- 3. Click on "Profile" link
- 4. Find Administrative Permissions in the list
 → Ensure "API Enabled" option is checked



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lew Salesforce Mobile App QuickStart	Allow Inclusion of Code Snippets from UI	Manage Promoted Search remins	
ptimizer	Allow user to modify Private Connections	Manage Public Classic Email Templates	✓
	Apex REST Services	Manage Public Documents	✓ ✓
DMINISTRATION	API Enabled	Manage Public List Views	✓
Users	Apt Only User	Manage Release Updates	
Permission Set Groups	Assign Permission Sets	✓ Manage Reporting Snapshots	
	Author Apex	✓ Manage Reports in Public Folders	
Permission Sets	Bulk API Hard Delete	Manage Roles	1
Profiles	Can Approve Feed Post and Comment	Manage Salesforce CRM Content	✓
Public Groups	Change Dashboard Colors	Manage Salesforce Knowledge	✓
Queues	Chatter Internal User	Manage Sandboxes	✓
	Close Conversation Threads	Manage Session Permission Set Activations	
Roles	Configure Custom Recommendations	Manage Sharing	1
User Management Settings	Create and Customize Dashboards	Manage Synonyms	1
Users	Create and Customize List Views	Manage Trust Measures	
Data	Create and Customize Reports	Manage Unlisted Groups	✓
	Create and Own New Chatter Groups	Manage Users	
Email	Create and Set Up Experiences	Moderate Chatter	
LATFORM TOOLS	Create and Update Second-Generation Packages	Moderate Experience Cloud Site Users	
Apps	Create and Upload Change Sets Create CMS Workspaces and Channels	Modify All Data Modify Metadata Through Metadata API Functions	1
	Create CmS workspaces and Channels Create Content Deliveries	Modify metadata Infougn metadata API Functions Password Never Expires	
Feature Settings	Create Dashboard Folders	✓ Passing rests in Feeds	
Slack	Create Public Links	✓ Query All Files	
Einstein	Create Report Folders	✓ Quip Metrics	
Objects and Fields	Customize Application	✓ Quip User Engagement Metrics	
	Debug Apex	Remove People from Direct Messages	
Events	Delete Second-Generation Packages	Report Builder (Lightning Experience)	
Process Automation	Deploy Change Sets	✓ Reset User Passwords and Unlock Users	
User Interface	Edit HTML Templates	Run Macros on Multiple Records	✓
Custom Code	Edit My Dashboards	Salesforce Anywhere in Lightning Experience	

How do I check for object permissions in Salesforce?

- 1. Click the Avatar on the top right corner
- On the left hand rail, "My Personal Information" → "Advanced User Details"
- 3. Click on "Profile" link
- 4. Search for **Standard Object Permissions** →

At least "Read" level access must be enabled for these 4 objects: Accounts, Contacts, Leads, Opportunities

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Users	Authorization Forms	✓	✓	√	✓	✓	✓	Individuals	✓	✓	✓
Permission Set Groups	Authorization Form Consents	✓	✓	✓	✓	✓	1	Leads	✓	✓	✓
Permission Sets	Authorization Form Data Uses	✓	✓	✓	✓	√	✓	Locations	✓	✓	√
Profiles	Authorization Form Texts	 ✓ 	✓	✓	✓	✓	✓	Location Trust Measures	✓	 ✓ 	✓
Public Groups	Background Operations	✓	✓	✓	✓	✓	✓	Macros	✓	✓	✓
Queues	Business Brands	 ✓ 	✓	✓	✓	✓	✓	Opportunities	✓	✓	✓
Roles	Campaigns	✓	✓	✓	✓	√	✓	Orders	✓	✓	√
User Management Settings	Cases	✓	✓	✓	✓	✓	✓	Party Consents	✓	✓	✓
Users	Communication Subscriptions	✓	√	√	✓	√	✓	Price Books	✓	✓	✓
Data	Communication Subscription Channel Types	 ✓ 	✓	 ✓ 	✓	 ✓ 	×.	Privacy Consents	 ✓ 	 ✓ 	 ✓
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Einstein	Contact Point Emails	✓ ✓	× •	✓ ✓	v √	 ✓ 	✓ ✓	Scorecard Metrics	✓ ✓	 ✓ 	
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How do I check for password policies?

- 1. Click the Avatar on the top right corner
- On the left hand rail, "My Personal Information" → "Advanced User Details"
- 3. Click on "Profile" link
- 4. Search for **Password Policies** \rightarrow

Check User passwords expire in



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Roles											
User Management Settings	Password Policies User passwords expire in	Never expires									
Users		Never expires 3 passwords remem	bered								
Data	Minimum password length	8									
	Password complexity requirement Password question requirement			characters							
Email	Maximum invalid login attempts		word								
LATFORM TOOLS	Lockout effective period										
Apps	Obscure secret answer for password resets										
	Require a minimum 1 day password lifetime										
Feature Settings	Don't immediately expire links in forgot password emails										
Slack				Edit	one Delete View	w Users					
Einstein											



How do I find and change My Domain?

- 1. From Setup, in the Quick Find box, enter My Domain, and then select My Domain.
- 2. Under "My Domain Details" copy and paste the "Current My Domain URL" Ex: https://mycompany.my.salesforce.com

FAQ

Resources





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