Getting started with:

LinkedIn Revenue Attribution Report

What you will learn in this guide

1 Introduction

- What is Revenue Attribution Report (RAR)?
- What can you do with RAR?

2 How it works

- How does RAR work?

3 How to set it up

- Salesforce prerequisite checklist
- Using the report

4 FAQ

- 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?

5 Resources

- Useful links

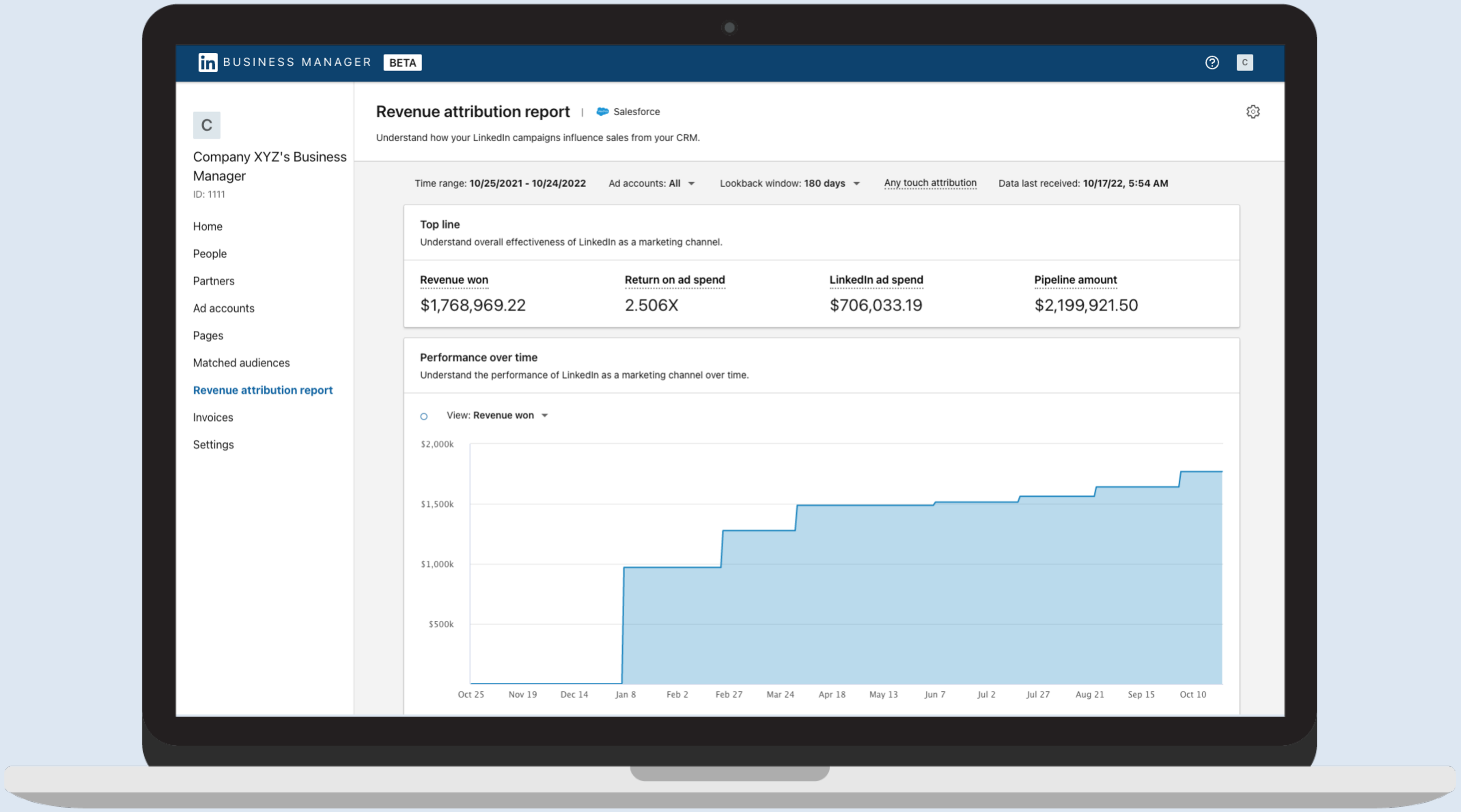
TIP: Use the presentation mode for an interactive experience

1

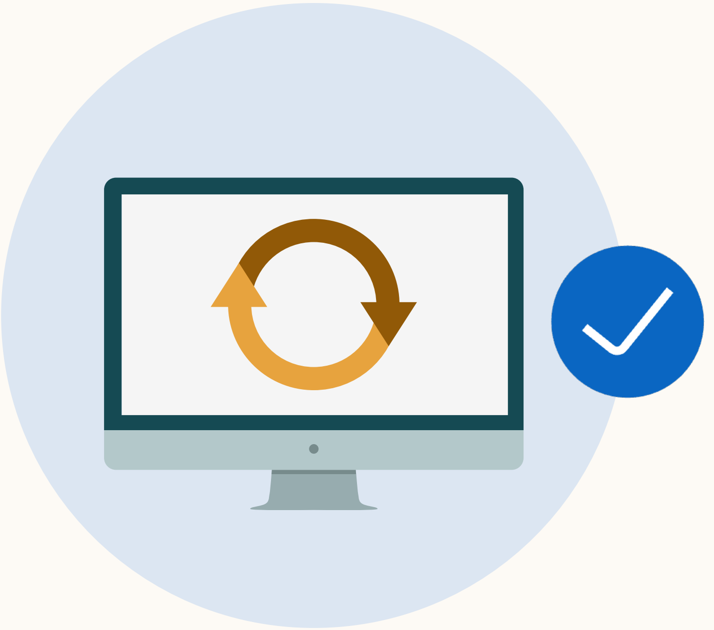
Introducing Revenue Attribution Report

What is Revenue Attribution Report?

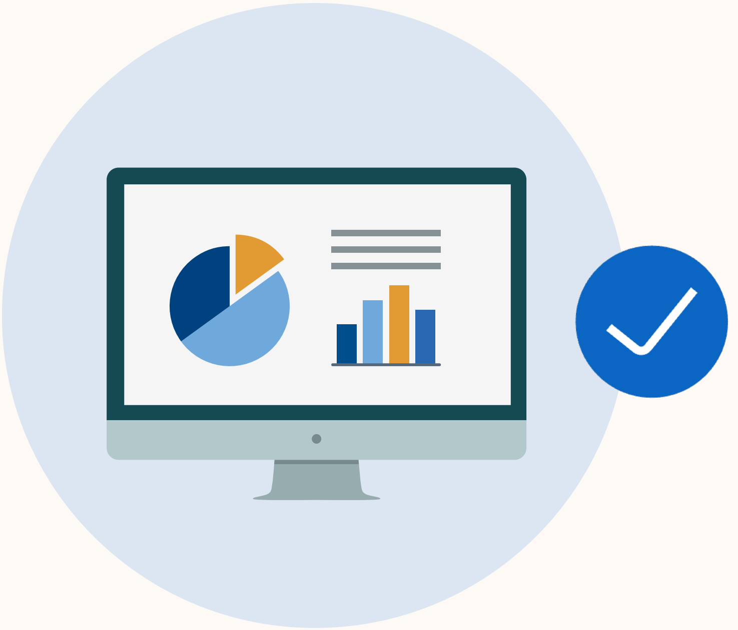
A new report enabling you to demonstrate how your marketing efforts are influencing revenue for your business.



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.



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!

1. If you haven't already, create your Business Manager here (best practices).
2. Leverage the Salesforce Prerequisites Checklist to ensure your CRM has the appropriate settings.
3. Sync your CRM to Business Manager.
4. Use Revenue Attribution Report to track key metrics influenced by LinkedIn.

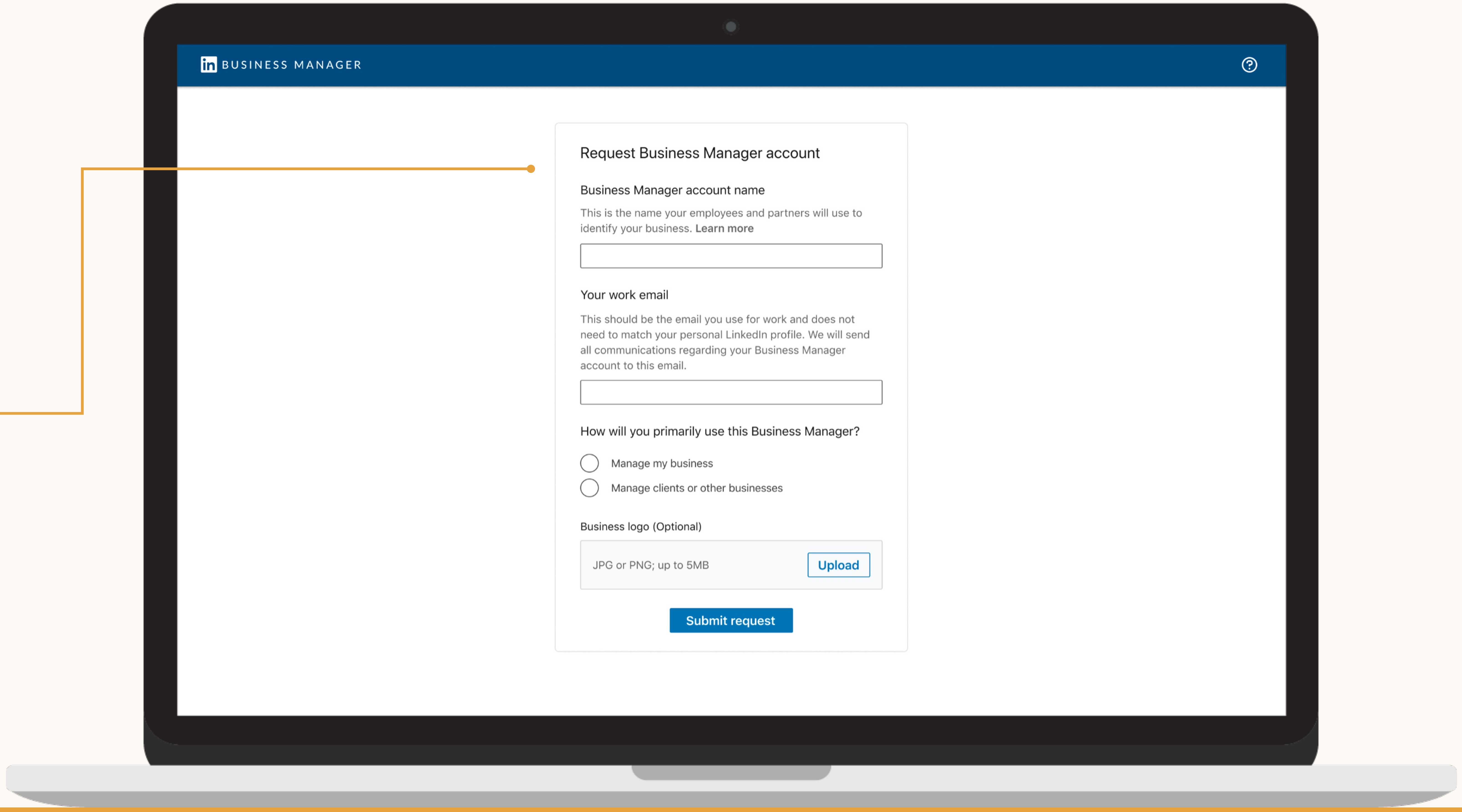
3

How to set up Revenue Attribution Report

Create your Business Manager

Revenue Attribution Report requires a Business Manager

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



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

Salesforce Prerequisites Checklist

Revenue Attribution Report requires a Salesforce CRM* sync.

Tip: Set password to never expire. 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.

- It is recommended to use an Integration User
  Rather than a personal or generic admin account to avoid accidental sync disconnection due to permission changes.
- Ensure your Salesforce Profile has the API Enabled box checked.
- Enable CRM sync for all features using credentials with a permission level of "View" (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

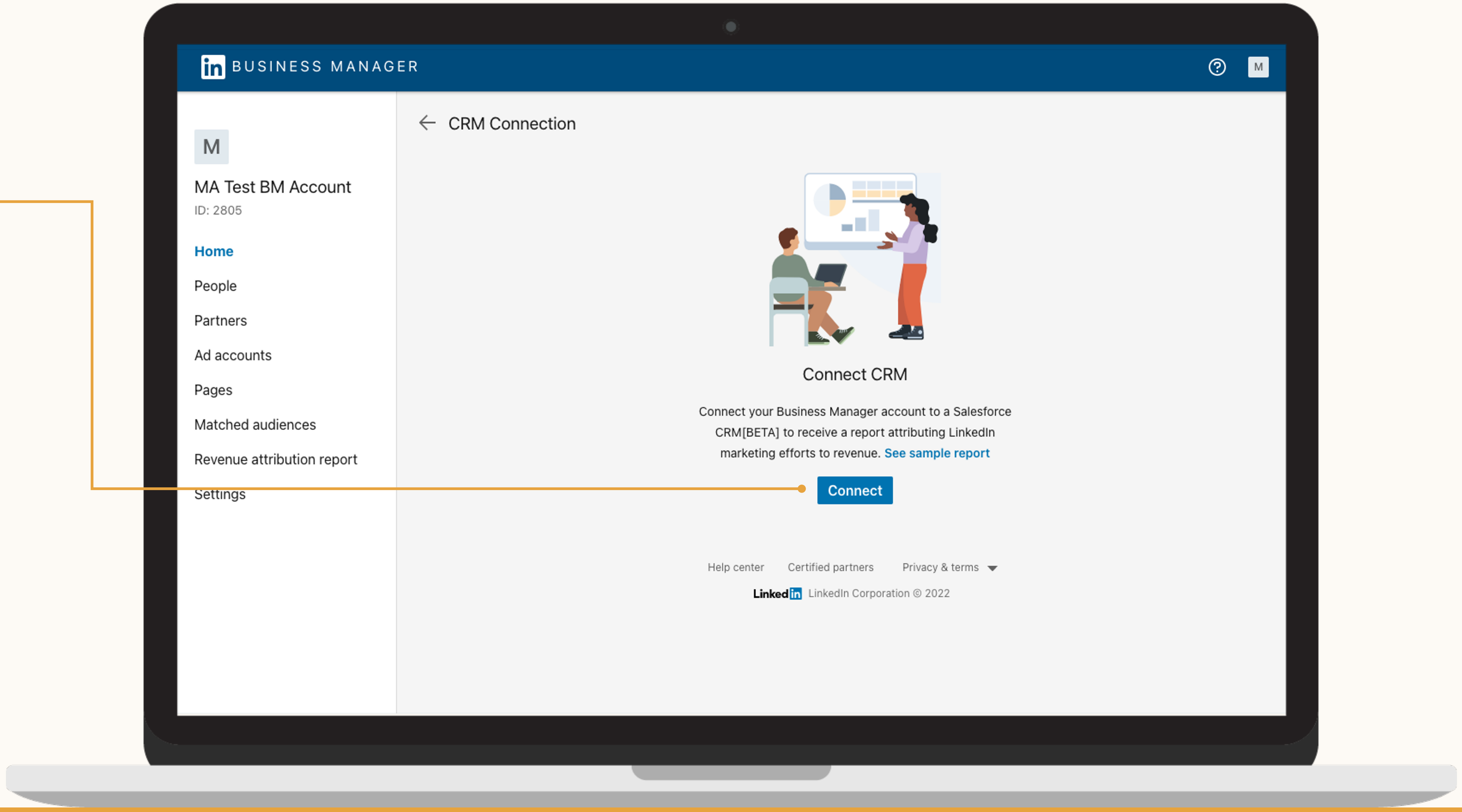
*Supported Salesforce editions: Enterprise, Performance, Unlimited, or Developer edition

*Salesforce: Professional Edition requires API Access (may require an additional fee, contact Salesforce support for more information)

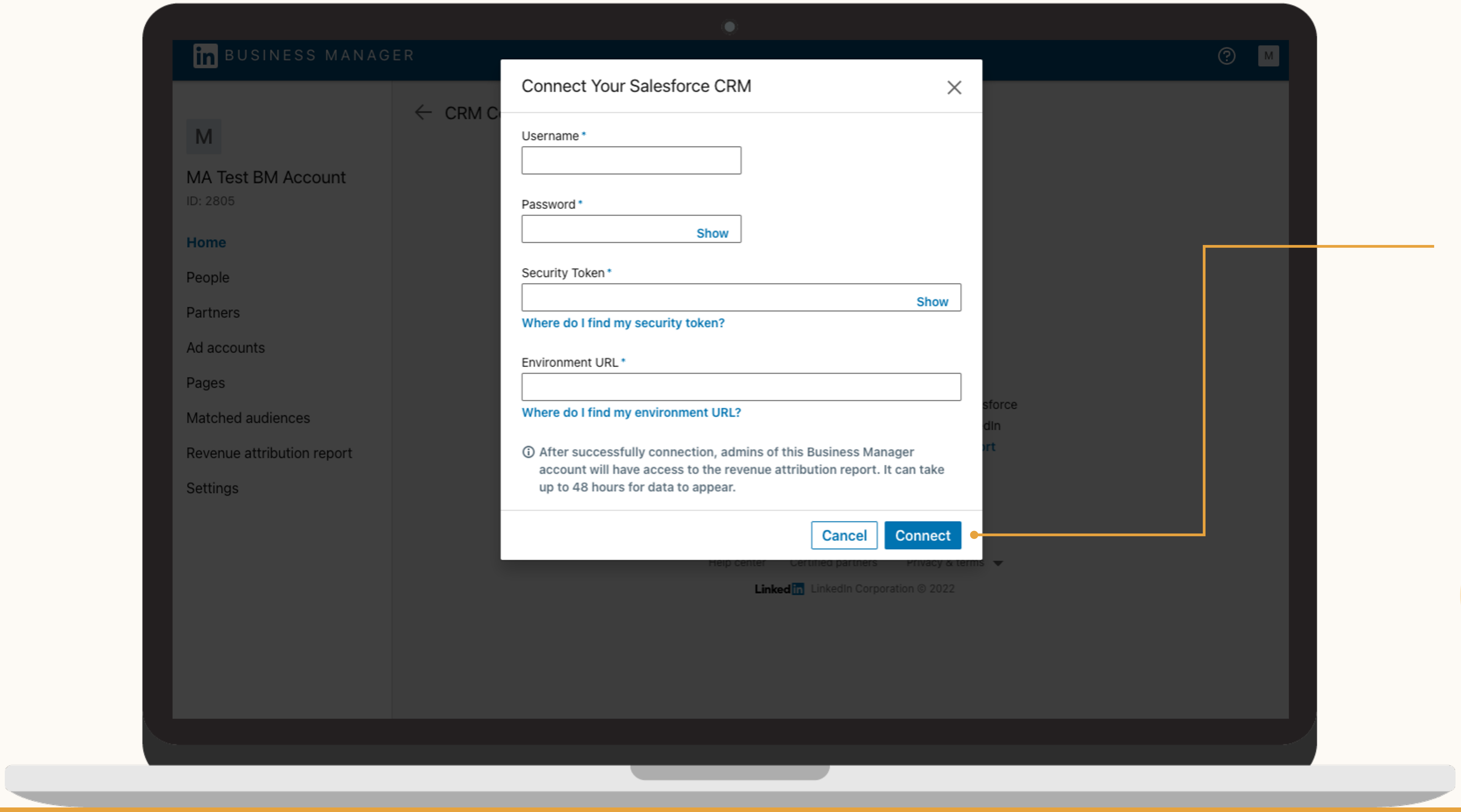
CRM: How to Sync your CRM to Business Manager

1. Connect CRM

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



CRM: How to Sync your CRM to Business Manager



2. Provide Credentials

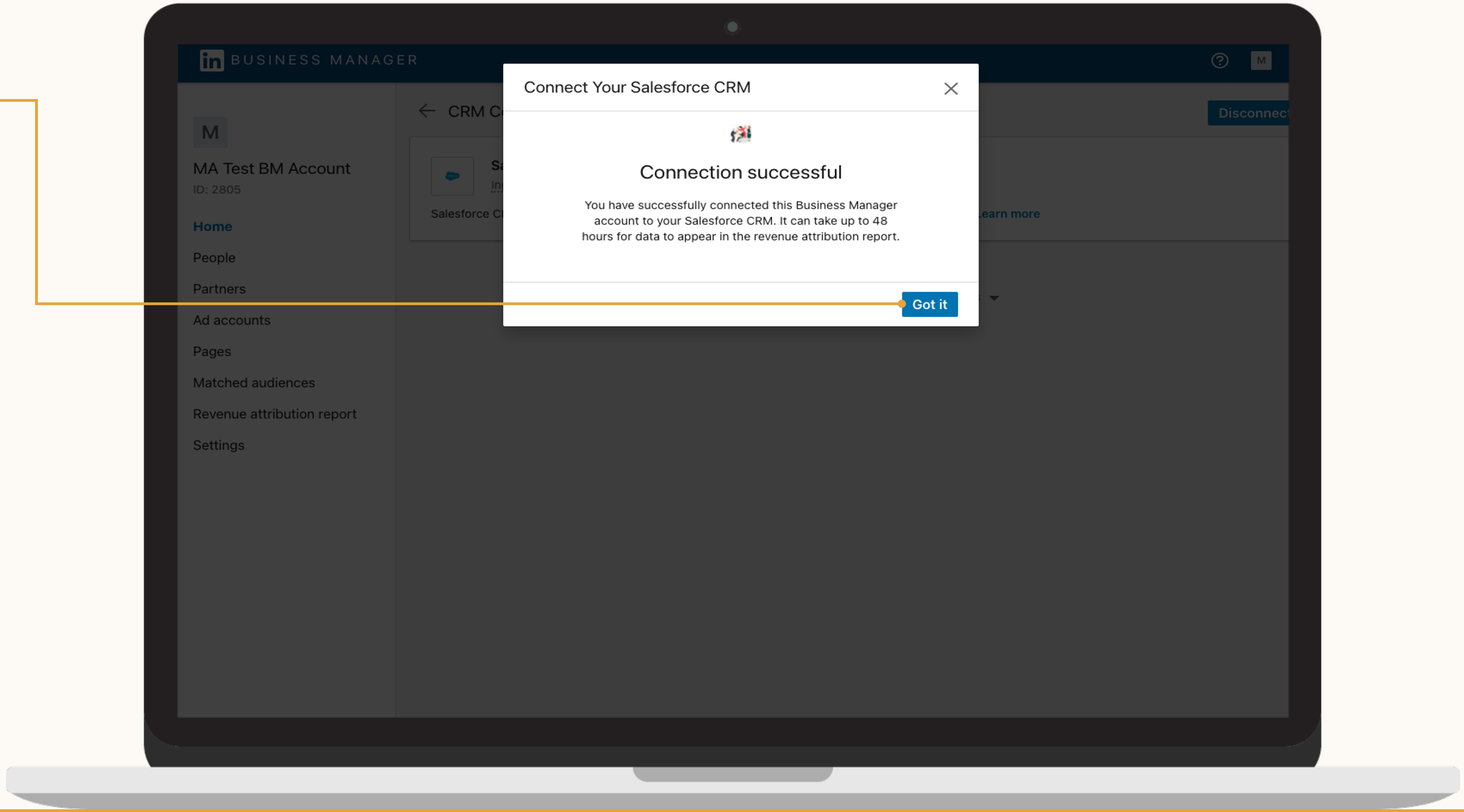
In order to connect your Salesforce CRM you must provide your Salesforce Username and Password, Security Token, and Environment URL.

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

CRM: How to Sync your CRM to Business Manager

3. Success!

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

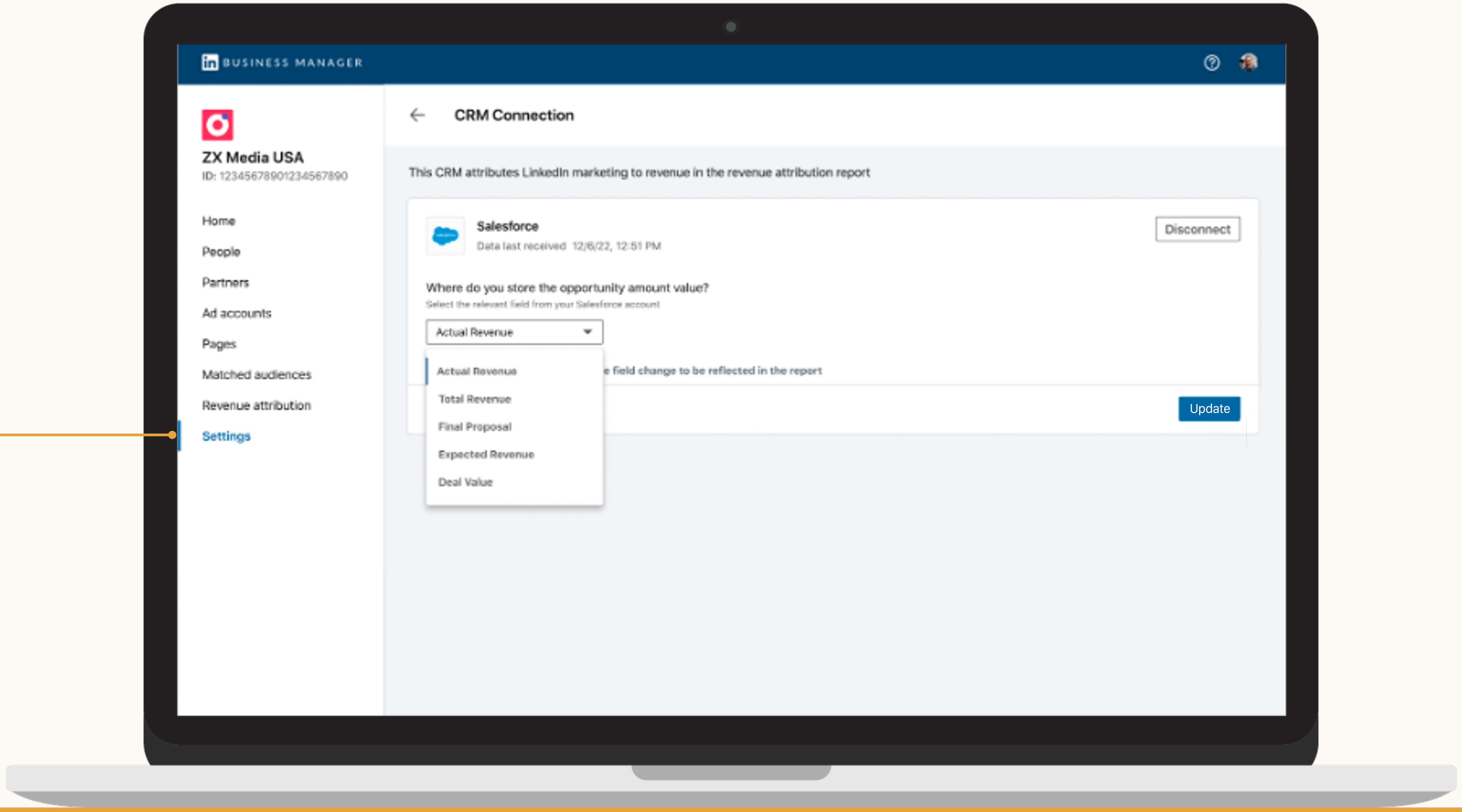


Tip: Learn about LinkedIn's Data Handling and Privacy Policies here.

CRM: How to Sync your CRM to Business Manager

4. CRM fields

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



Using Revenue Attribution Report

What metrics are available in the Revenue Attribution Report?

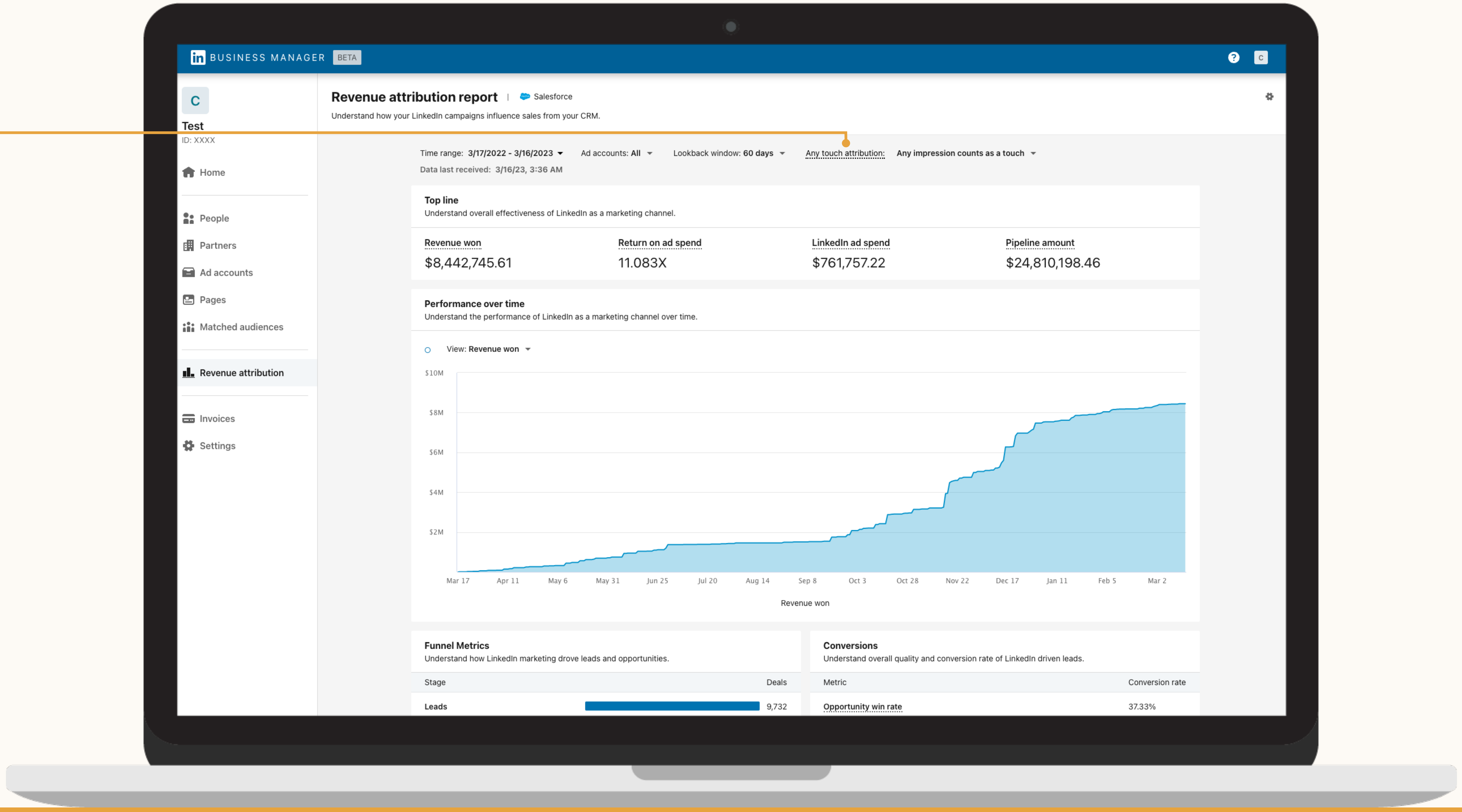
Top line metrics	Revenue won	The sum of closed-won opportunities influenced by LinkedIn marketing efforts.
	Return on ad spend (ROAS)	Revenue won divided by LinkedIn ad spend.
	LinkedIn ad spend	The sum of ad spend across Ad Accounts owned by your Business Manager account.
	Pipeline amount	Dollar amount of open opportunities influenced by LinkedIn marketing.
Funnel metrics	Leads	Total leads influenced by LinkedIn marketing.
	Open opportunities	Total open opportunities influenced by LinkedIn marketing.
	Closed won opportunities	Total closed won opportunities influenced by LinkedIn marketing.
Conversion metrics	Lead conversion rate	The number of influenced converted leads divided by the number of total influenced leads.
	Opportunity win rate	Number of influenced closed won opportunities divided by the number of influenced closed opportunities.
	Average deal size	Average amount across all closed won opportunities influenced by LinkedIn marketing.
	Average days to close	Average days to close across all closed won opportunities influenced by LinkedIn marketing.

Metrics: Attribution Models

Available attribution models

Currently Revenue Attribution Report reports on any touch attribution.

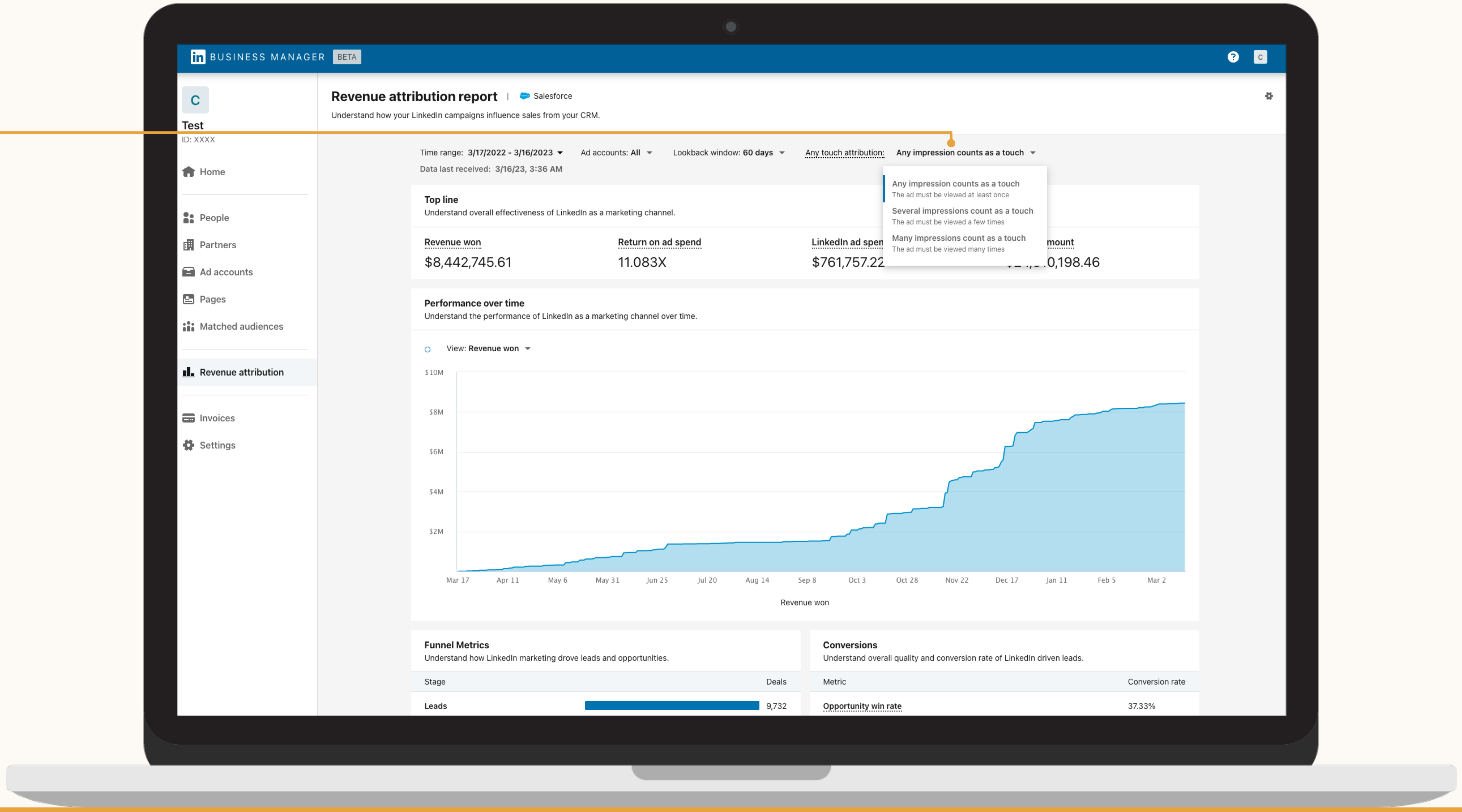
Any touch attribution is defined as leads who have engaged with LinkedIn marketing activities within the given lookback window.



Metrics: Attribution Models

Toggle between thresholds

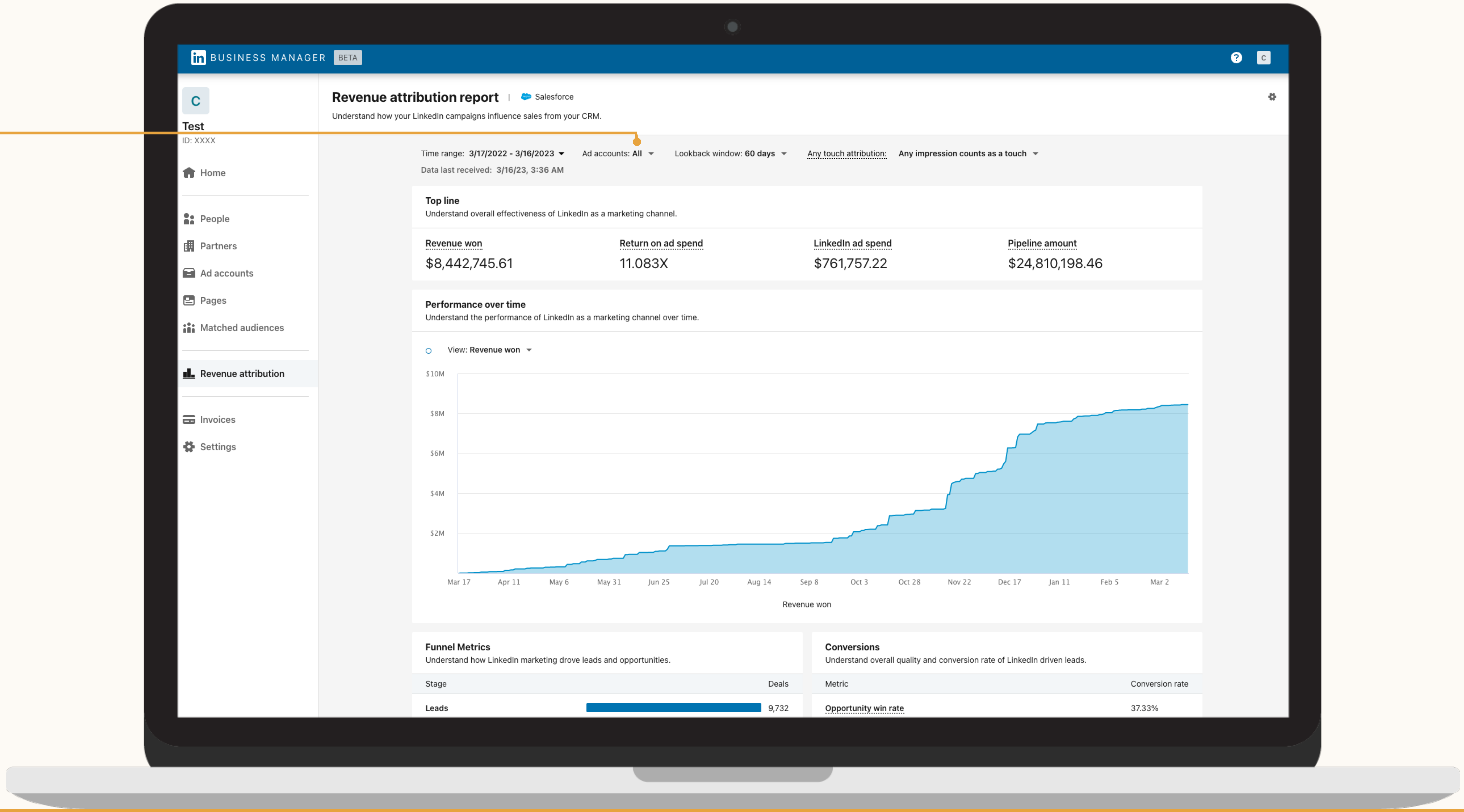
Choose between any, few, and many impressions you want to count before attributing credit to LinkedIn influenced.



Reporting: Filter by Ad Account

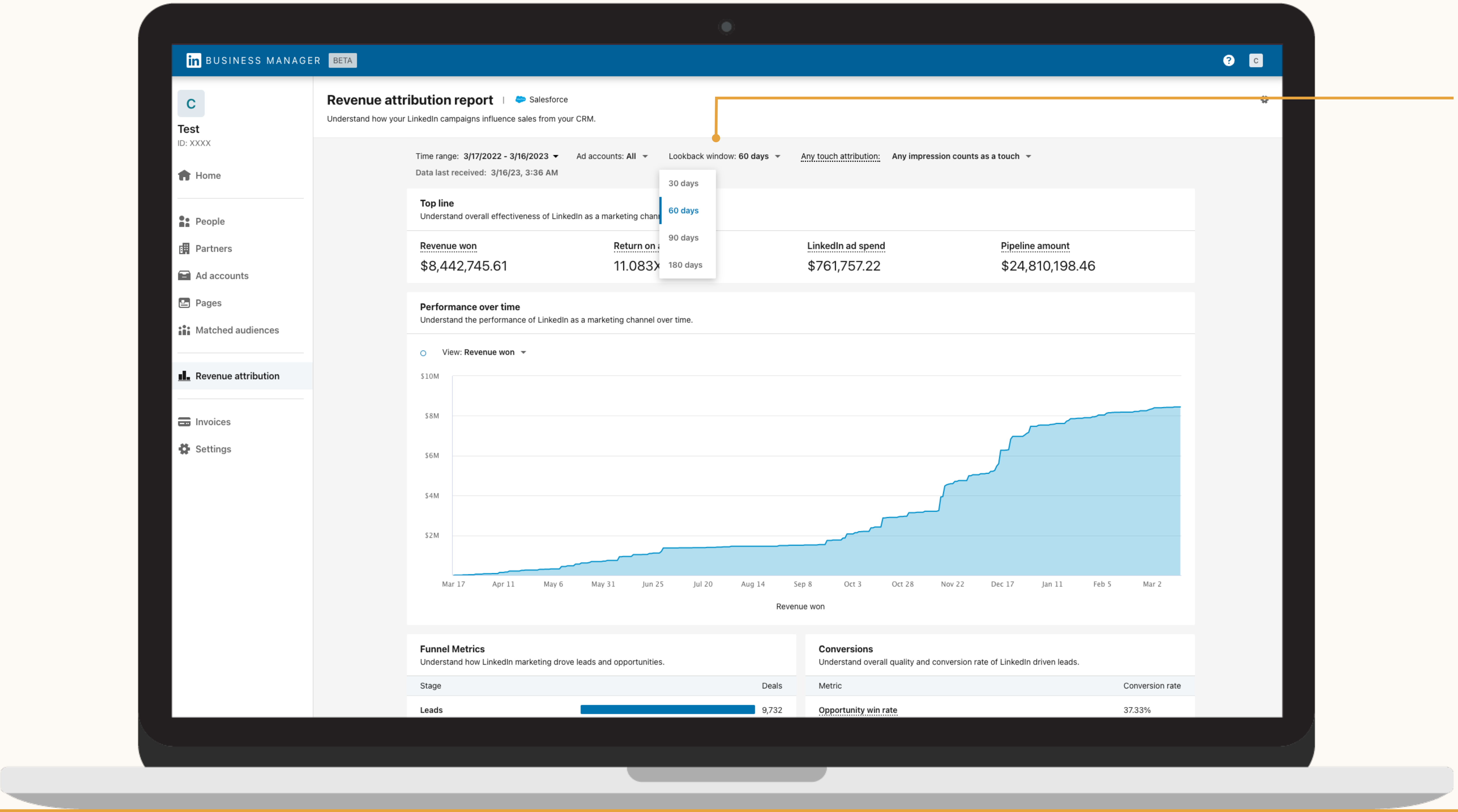
Filter your report by ad account

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!

Reporting: Custom Lookback Window



Adjust your lookback window

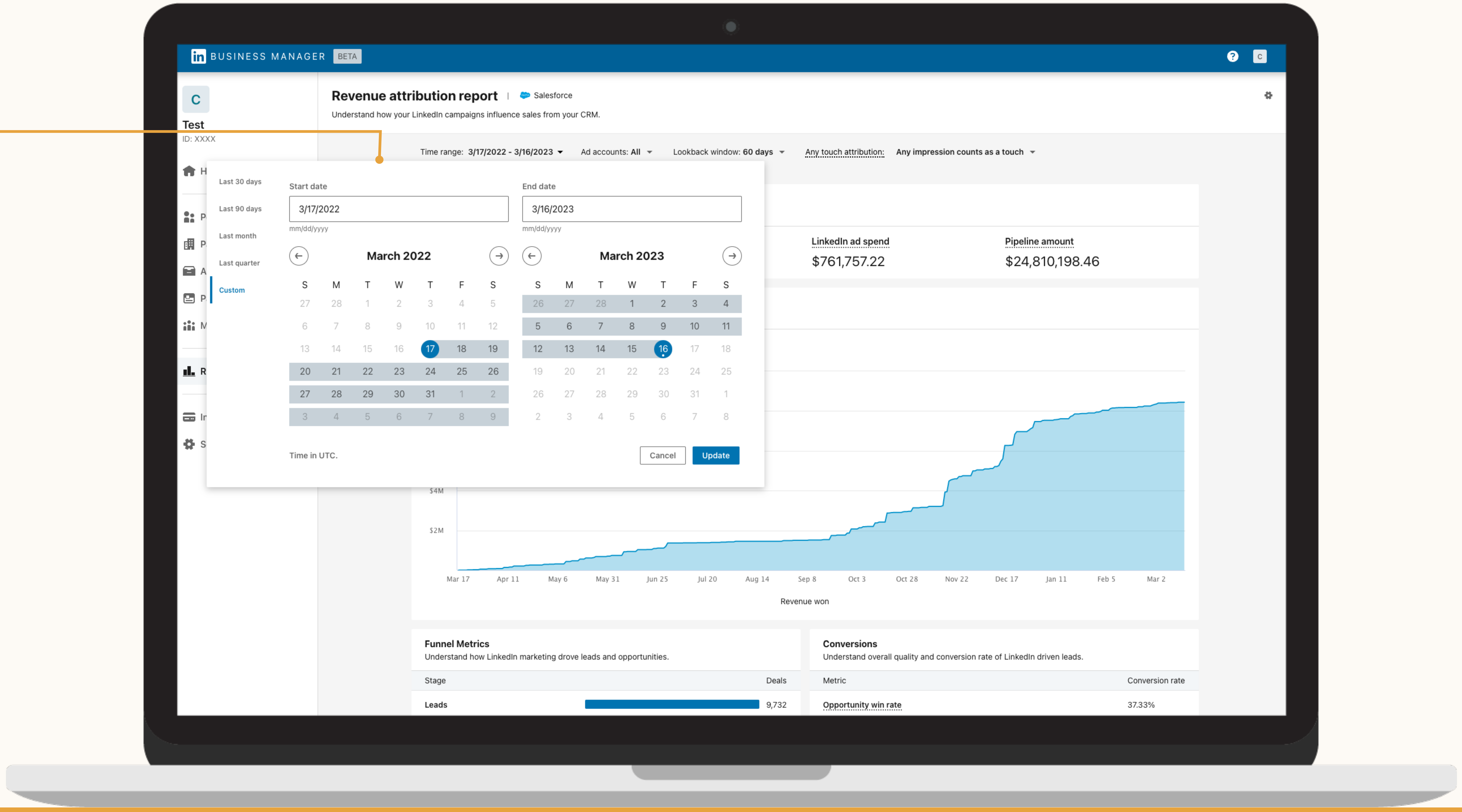
See how your marketing impacts deal size and other funnel metrics by adjusting your lookback window to 30, 60, 90, or 180 days.

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.



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.

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Frequently Asked Questions

How does RAR attribution work today?

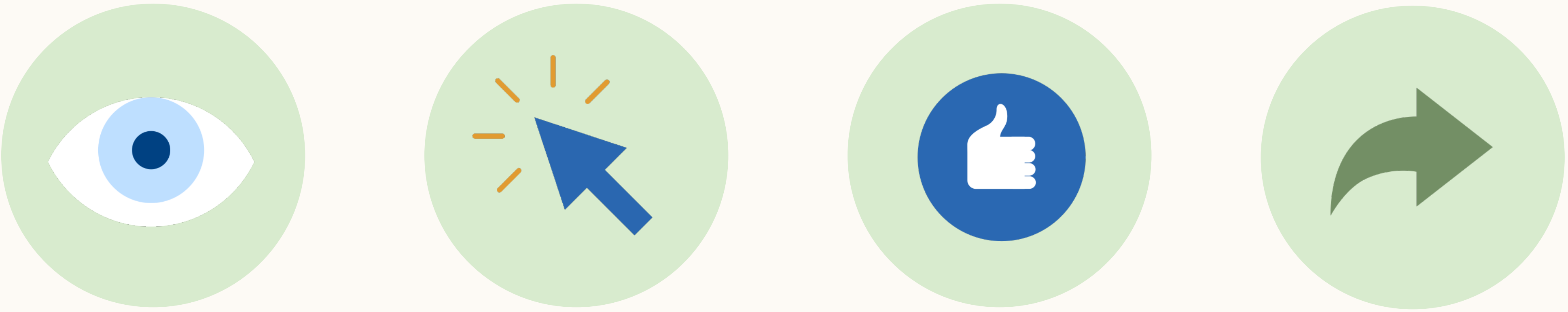
Currently, Revenue Attribution Report reports on any touch attribution.

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.

How does RAR define engagement?

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



Views | Clicks | Likes | Shares

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 [CRM data handling and protection for Revenue Attribution Report](#).

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, OwnerId, 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 Salesforce Prerequisite Checklist.

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Helpful resources

Learn more with these useful resources

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

Thank you

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

LinkedIn

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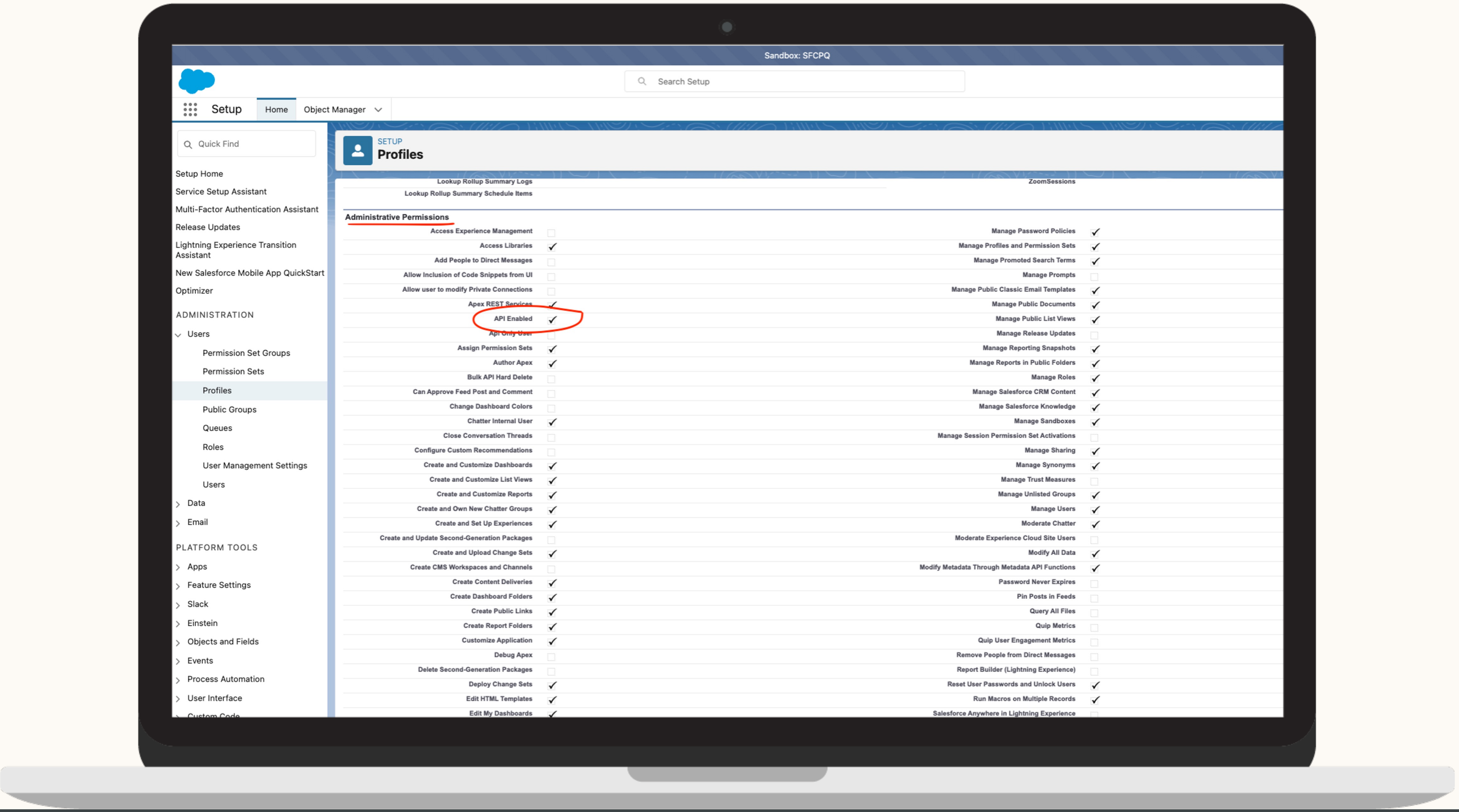
Appendix

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

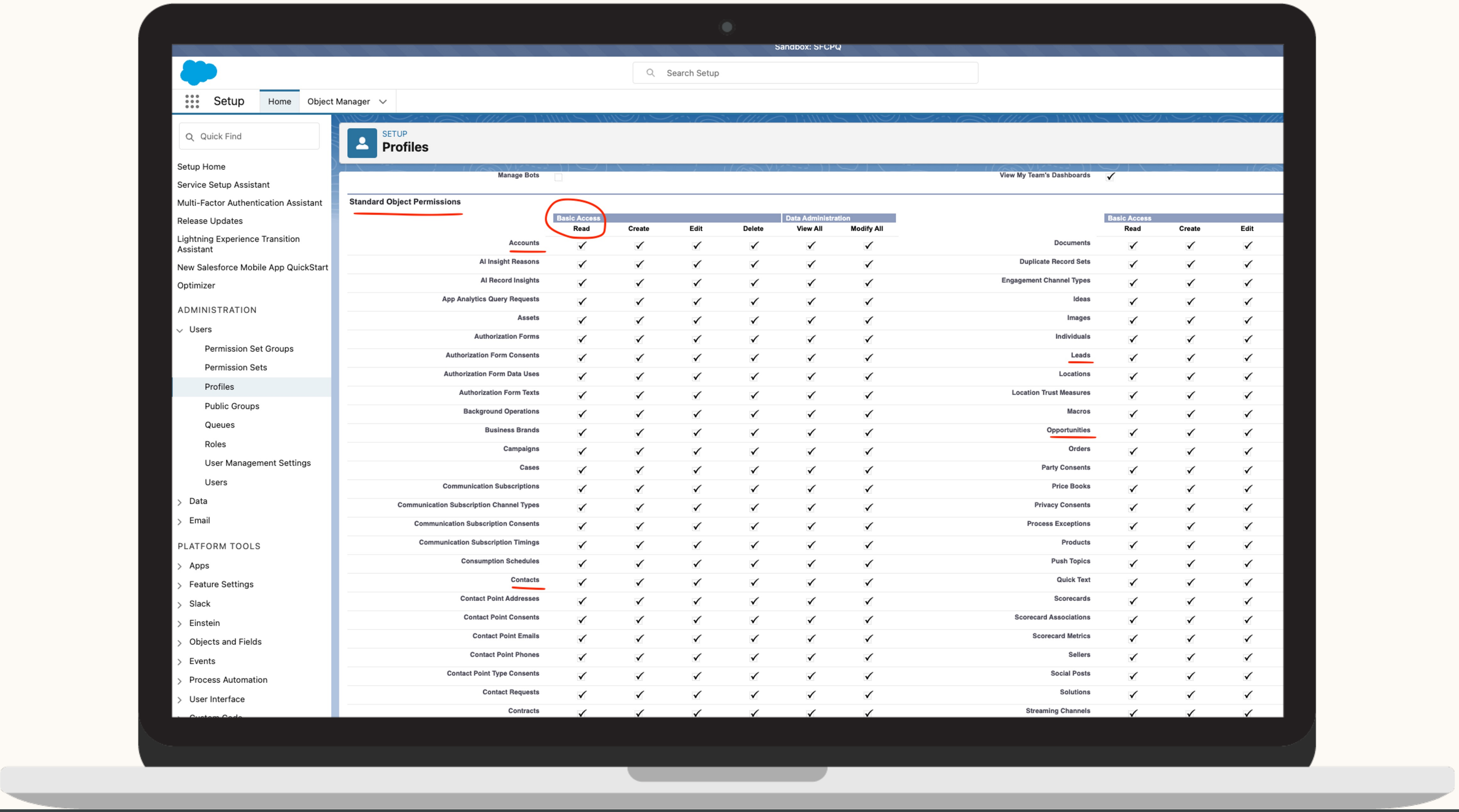
1. Click the Avatar on the top right corner
2. On the left hand rail, “My Personal Information” → “Advanced User Details”
3. Click on “Profile” link
4. Find **Administrative Permissions** in the list → Ensure **“API Enabled”** option is checked



How do I check for object permissions in Salesforce?

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

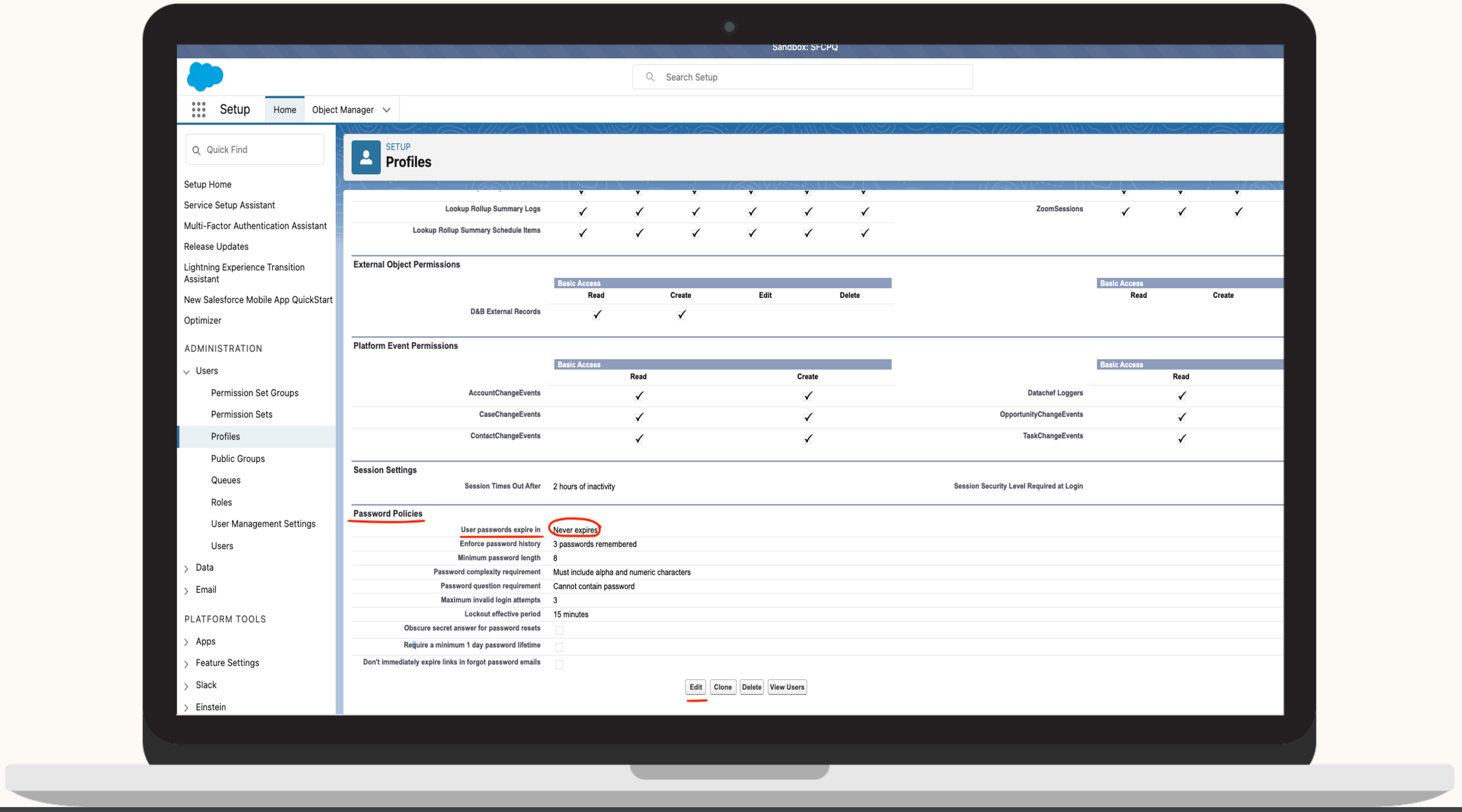
At least “Read” level access must be enabled for these 4 objects: Accounts, Contacts, Leads, Opportunities



How do I check for password policies?

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

   Check User passwords expire in



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*