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
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?

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

2. **View reports directly from your Business Manager Ad Accounts to show how LinkedIn marketing impacts sales metrics.**
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.
How to set up Revenue Attribution Report
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.

- 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 and password.

*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.

**Tip:** Logging in via OAuth enables you to connect your CRM without sharing your credentials with LinkedIn and ensures longer validity of your CRM connection.
Introduction

How it works

How to set it up

FAQ

Resources

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?

<table>
<thead>
<tr>
<th>Top line metrics</th>
<th>Conversion metrics</th>
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<tbody>
<tr>
<td>Revenue won</td>
<td>Lead conversion rate</td>
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<tr>
<td>Return on ad spend (ROAS)</td>
<td>Opportunity win rate</td>
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<tr>
<td>LinkedIn ad spend</td>
<td>Average deal size</td>
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<tr>
<td>Pipeline amount</td>
<td>Average days to close</td>
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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.
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!
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.
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.
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?

<table>
<thead>
<tr>
<th>Object</th>
<th>Fields</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead</td>
<td>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</td>
<td>Match CRM Leads to Contact level data in Business Manager</td>
</tr>
<tr>
<td>Contact</td>
<td>Id, AccountId, CreatedDate, Department, Description, Email, Fax, FirstName, LastActivityDate, LastName, LastModifiedDate, LastReferencedDate, LastViewedDate, LeadSource, MailingStreet, MailingCity, MailingCountry, MailingState, Name, Phone, Title</td>
<td>Match CRM Contacts to Leads</td>
</tr>
<tr>
<td>Account</td>
<td>Id, Name, Website, AnnualRevenue, NumberOfEmployees, Phone, Industry, Type, BillingStreet, BillingCity, BillingState, BillingCountry, BillingPostalCode, CreatedDate, LastModifiedAccount, OwnerId, Description, Fax, ParentId, ShippingCity, ShippingCountry, ShippingPostalCode, ShippingState, ShippingStreet, LastReferencedDate, LastViewedDate, Rating, TickerSymbol, Ownership</td>
<td>Match CRM Accounts to Accounts in Business Manager</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Id, AccountId, Amount, CloseDate, CreatedDate, IsClosed, IsWon, LastActivityDate, LastReferencedDate, LastViewedDate, LeadSource, Name, OwnerId, StageName, Type, LastModifiedDate</td>
<td>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</td>
</tr>
</tbody>
</table>
What information & permissions do I need to connect my CRM?

Please leverage our Salesforce Prerequisite Checklist.
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.
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
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