

Getting started with:

LinkedIn's Revenue Attribution Report



What you will learn in this guide





Revenue Attribution Report?

TIP: Use the presentation mode for an interactive experience

How to set it up

- CRM prerequisite checklist

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

5 Resources

• Useful links



1 Introducing the Revenue Attribution Report



What is the Revenue Attribution Report?

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







What can you do with the 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





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



2 How does the Revenue Attribution Report work?



How does the 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>CRM 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 the Revenue Attribution Report

FAQ

Resources



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Create your Business Manager

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	mv	business
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Manage clients or other businesses

Business logo (Optional)

JPG or PNG; up	to 5MB		Upload
		_	
	Submit request		





CRM Prerequisites Checklist

Revenue Attribution Report requires a Salesforce or Dynamics CRM sync.

*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) **Supported Dynamics editions: Microsoft Dynamics 2026 online (including 0/1 and update 1 releases) and Dynamics 365 (online only), running on version 8.2 or higher



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.

Note: If using Salesforce, ensure your **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 <u>here</u>.

Ready to connect your CRM! You'll need your CRM username and password (If using Dynamics, you'll also need your environment URL).

1. Connect CRM

Head to the Revenue Attribution Report Tab to connect your CRM.



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2. Provide Credentials

In order to connect your CRM you must provide your Username, Password, and environment URL*.



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.

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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>.



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FAQ



? in BUSINESS MANAGER * ZX Media **Revenue attribution report** ID: 123456789123456 Understand how your LinkedIn campaigns influence sales from your CRM leads. Learn more Salesforce | 90% match rate | Data last received: 8/5/23, 12:42 PM Time range: 1/1/21 - 3/19/21 -Any touch attribution: any impression is counted as a touch 💌 Ad accounts: All 🔻 Lookback window: 60 days Top line Understand overall effectiveness of LinkedIn as a marketing channel. LinkedIn ad spend **Pipeline amount** Revenue won Return on ad spend \$1,600,000 \$5,050,000 3.1X \$5,800,000 Matched audiences Performance over time Understand the performance of LinkedIn as a marketing channel over time. Revenue attribution ○ View: Revenue won ▼ 1000000000000000 5N 4M ЗM 2M 1M Mar 15 Jan 4 Mar 8



4. CRM fields

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



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Using the Revenue Attribution Report

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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 l		
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		

FAQ



on opportunities influenced by LinkedIn marketing efforts.

by LinkedIn ad spend.

across Ad Accounts owned by your Business Manager account.

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closed won opportunities divided by the number of influenced closed opportunities.

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Metrics: Attribution Models

Revenue Attribution Report reports on an any touch attribution model

Any touch attribution is defined as leads who have seen or engaged with your LinkedIn ad within the given lookback window.

Toggle between how many impressions or engagements are needed to count as LinkedIn marketing influence.



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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: Filter by Campaign

Or filter at the campaign-level

Drill down top-line report metrics by campaign.



Tip: More efficiently allocate budget across campaigns by understanding what's most effective in influencing revenue and pipeline







Reporting: Custom Lookback Window

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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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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 seen or engaged with your LinkedIn marketing activities within the attribution window (default: 180 days)



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





Frequently Asked Questions



Introduction

How does RAR attribution work today?

Currently, Revenue Attribution Report reports on an any touch attribution model. Any touch attribution is defined as leads who have seen or engaged with your LinkedIn ad within the given lookback window.

CRM 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 seen or 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.

You can specify how many touchpoints are needed within the given lookback window in order to count as LinkedIn marketing influence.



Introduction

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> protection for Revenue Attribution Report.

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

Please leverage our <u>CRM 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>
- <u>RAR metric definition from CRM data</u>
- RAR CRM data imports from CRM data











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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Permission Sets	Bulk API Hard Delete	Mana	age Roles 🗸
Profiles	Can Approve Feed Post and Comment	Manage Salesforce CRN	il Content 🗸
Public Groups	Change Dashboard Colors	Manage Salesforce Kr	nowledge 🗸
	Chatter Internal User	✓ Manage Sa	andboxes 🗸
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> Feature Settings	Create Content Deliveries	✓ Password Neve	
> Slack	Create Dashboard Folders	V Pin Posts	
	Create Public Links	•	y All Files
> Einstein	Create Report Folders	*	Ip Metrics
> Objects and Fields	Customize Application	Quip User Engagemen	
> Events	Debug Apex	Remove People from Direct N	
> Process Automation	Delete Second-Generation Packages	Report Builder (Lightning Ex	
·	Deploy Change Sets	Reset User Passwords and Unio	
> User Interface	Edit HTML Templates	Run Macros on Multiple	
Custom Code	Edit My Dashboards	Salesforce Anywhere in Lightning Ex	xperience

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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v Salesforce Mobile App QuickStart	Al Insight Reasons	1	~	1	1	~	1	Duplicate Record Sets	1	1	1
imizer	Al Record Insights	1	~	1	1	1	~	Engagement Channel Types	1	1	1
	App Analytics Query Requests	1	~	1	1	1	1	Ideas	1	1	1
MINISTRATION	Assets	1	~	1	1	1	1	Images	1	1	1
Users	Authorization Forms	1	~	1	~	1	1	Individuals	1	1	1
Permission Set Groups	Authorization Form Consenta	1	1	1	1	1	1	Leads	1	1	1
Permission Sets	Authorization Form Data Uses	1	1	1	1	1	~	Locations	1	1	1
Profiles	Authorization Form Texts	1	~	1	1	1	1	Location Trust Measures	1	1	1
Public Groups	Background Operations	1	~	1	1	1	1	Macros	1	1	1
Queues	Business Brands	1	~	1	1	1	1	Opportunities	1	1	1
Roles	Campaigna	1	~	1	~	~	1	Orders	~	1	~
User Management Settings	Cases	1	~	1	1	1	1	Party Consents	1	1	1
Users	Communication Subscriptions	1	~	~	~	~	1	Price Books	~	~	1
Data	Communication Subscription Channel Types	1	1	1	1	1	1	Privacy Consents	1	~	1
Email	Communication Subscription Consents	1	~	1	~	1	1	Process Exceptions	~	1	~
TFORM TOOLS	Communication Subscription Timings	1	1	1	1	~	1	Products	~	1	~
Apps	Consumption Schedules	1	1	1	~	1	1	Push Topics	1	1	1
Feature Settings	Contacts	1	~	1	1	1	1	Quick Text	1	1	1
Slack	Contact Point Addresses	1	~	1	~	1	1	Scorecards	~	1	~
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Objects and Fields	Contact Point Emails	1	~	1	1	1	1	Scorecard Metrics	~	1	1
vents	Contact Point Phones	~	~	1	~	1	1	Sellers	~	1	1
Process Automation	Contact Point Type Consents	1	1	1	1	1	1	Social Posts	1	1	1
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