



Onboarding Guide



Welcome

Now more than ever is an exciting time to work with LinkedIn because we are built for you!

Our platform is the perfect foundation for your agency and your clients. We understand your need to build long-term relationships in a short-term world, offering the tools to help you understand and build relationships with the professionals you're looking for at every step of the journey.

Results matter and you need to find the best way to drive and measure them in an evolving privacy landscape. We're driving the industry forward with our unique approach to professional identity and innovation around measurement.



Finally, you need to reach customers in a way that respects your needs and theirs. LinkedIn understands and respects professionals, and the agencies they work for, better than anyone else.

Ready to get started? Within the pages of this Onboarding Guide you will find impactful resources that will equip you to make the most out of your experience with LinkedIn Marketing Solutions.

As you journey through your onboarding know that your account rep is there for you each step of the way. If you are looking for your account rep, please reach out to [LMS Support](#).

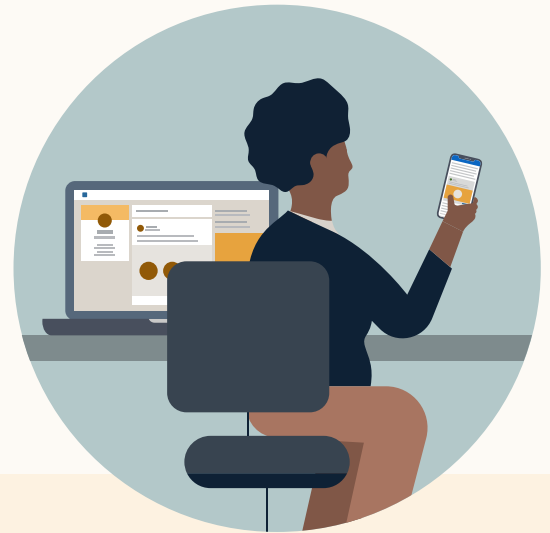
Be sure to check out our [Agency page](#) for additional tools, resources, customer stories, blog and more!

Why LinkedIn Marketing Solutions?

As the largest global community of business professionals, LinkedIn is the premier destination for finding and sharing professional content.

Kick things off by taking our [Introduction to LinkedIn Ads](#) on LinkedIn Marketing Labs. This essential resource will give you a strong foundation and will feature information such as:

- How to determine your campaign objective.
- Ad product solutions and targeting.
- Creating a Campaign Manager account and more!



Quick Stats

We're built to help marketers make B2B everything it can be, so you can build relationships and drive results all on a platform that respects your world.



#1 LinkedIn is ranked #1 for Legitimacy, Security, and Community by eMarketer



900M+
members



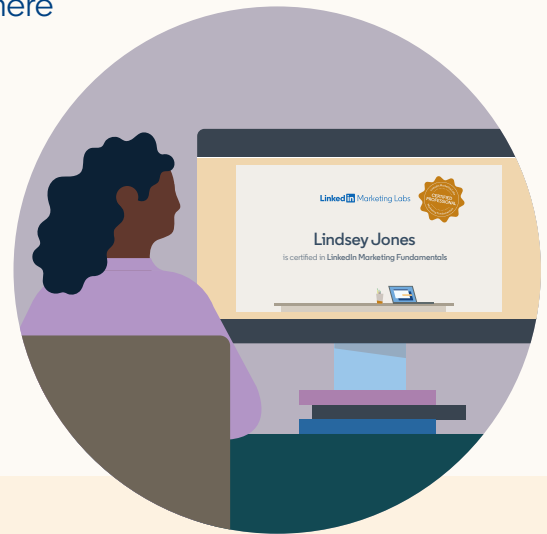
58M+
companies have a page on LinkedIn

- Tools built for the B2B sales cycle, which often lasts **6-9 months** and requires **6+ stakeholders**.
- **95%** of your prospective customers are not currently in-market. Only **5%** are looking to buy. Build relationships with both active and passive buyers on LinkedIn.
- Audiences exposed to brand and acquisition messages on LinkedIn are **6x more likely** to convert.
- Companies with an engaged LinkedIn page see **61% higher conversion** and **12% lower cost** per conversion.

Getting started with LinkedIn Marketing Solutions

There are two ways to get started with LinkedIn Marketing Solutions. The first is through our learning paths on Marketing Labs where you will gain valuable knowledge on all the foundational elements of creating and launching your ad campaigns and so much more!

The second is through our “How To’s” located on the Resources Page of this guide which will take you step-by-step through the top actions needed for getting up and running.



Understand Your Client's Goals and Audience

What is your client looking to accomplish with their LinkedIn Ad Campaign? Learn more about the basics of objective-based advertising with our [Introduction to LinkedIn Ads](#) course.



Getting the Right Access to the Right Tools

Having the right set of tools will help set your client up for success. LinkedIn offers a suite of tools specifically for you. Take courses in Marketing Labs to learn about [Pages](#), [Campaign Manager](#), and [Business Manager](#).



Build a Campaign and Report on It

Now that your objective is set and you have the right tools, it's time to identify and learn more about your [target audience](#), [build your campaign](#), and report on it using the [Insight Tag](#). This tag allows you to enable LinkedIn Marketing Solutions features like Conversion Tracking and Website Demographics.

LinkedIn Marketing Solutions Resources

'How To' Resources:

Create a Page: Setting up your LinkedIn Page only takes a few minutes!

How to Launch a Campaign: Learn campaign setup best practices to maximize performance results.

How to Set Up Conversion Tracking: Create conversions and then apply them to campaigns to view conversion tracking reporting.

How to Upload Matched Audiences: Upload lists for company and contact targeting for LinkedIn Ads.

How to Set Up Lead Gen Forms: Learn how to create forms and attach them to new campaigns.

How to Balance Brand & Demand: Spark awareness, engage, and convert your target audience across the buyer's journey.



Learning and Education Tools:

LinkedIn Marketing Labs: Learn the science of marketing to professionals. Experiment, learn, and get the most out of our free online training. *Live Trainings coming in H2!

Marketing Success Hub: Wherever you are in the process, discover the foundational tools you need for a successful campaign.

LinkedIn Ads Blog: Get inspiration, insights, and innovative ideas to help you achieve B2B marketing success.

Case Studies: Learn how LinkedIn Marketing Solutions helped brands achieve their goals.

LinkedIn Products & Tools Overview: Looking for a more comprehensive list of LinkedIn's products and tools? This overview will help familiarize you with our offerings.

Direct Support Tools:

Marketing Solutions Help Center: For answers to your general questions.

Marketing Solutions Support Team: For questions or issues with anything related to Campaign Manager, ad products, campaign set up, optimizations, or troubleshooting.

LinkedIn Pages Support: For questions or requests related to LinkedIn Pages and Showcase Pages including rebranding a Page, merging Pages, sunseting pages, and more.

Billing Team: For requests or questions related to billing, invoices, changing billing admin, receipt requests, charges, invoicing set up, and more.



Additional Resources

Staying In the Know:

Global Agency Briefing Newsletter:

Subscribe and receive the latest in content trends, beta product availability, agency guides & best practices, upcoming trainings & events, and more.

Pages & Organic Tools:

LinkedIn Pages Best Practices: Top tips and tricks to make the most out of your LinkedIn page.

LinkedIn Pages Enterprise Playbook:

Learn how the world's biggest companies organize internally, strategize content, and engage their employees to make the most of their LinkedIn Page.

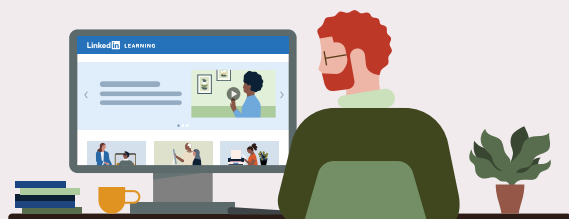
Organic + Paid Playbook: Provides a simple 1-2-3 plan for cultivating an integrated organic + paid strategy on LinkedIn.

Other LinkedIn Services:

Talent Solutions

Sales Solutions

LinkedIn Learning



Ad Campaign Tools:

LinkedIn Ads Toolkit: Whether you're new to digital advertising or a marketing pro, these one sheets, infographics, and checklists will make sure you're set up for success on LinkedIn.

Better LinkedIn Campaign Planning: Create and launch campaigns that contribute to a healthy full-funnel marketing strategy, with guided planning materials.

Targeting Playbook: Learn how LinkedIn Targeting works — and how to get the most of it by exploring LinkedIn's unique targeting and the important steps and best practices to tailor your ad targeting strategy for your campaign.

Bidding Best Practices: Campaign Manager gives you control over your ad campaign budgets by providing several budget options. How your budget is spent depends on your objective and vary by the ad format and optimization goal chosen.

Creative Best Practices: Learn how to design visually compelling creative that attracts LinkedIn members to engage with your content. Creative design is the collection of core visual elements supporting your creative strategy.

Measuring Campaigns: Learn how to get the most ROI for your ad spend.

Marketing Partner Directory: Trusted solutions to help you market your business on LinkedIn.



LinkedIn's Ad Product Solutions

You can use your LinkedIn Page as a central place to showcase your brand, join conversations that matter, understand and listen to your audience, and engage your people. The LinkedIn Page is separate from your LinkedIn profile.

Learn more about our different [types of ads](#) and [how to create an ad account](#).

	Post Type	KPI	Bid Type	3rd Party Measurement
Sponsored Content	Video Ad	Brand awareness	Automated, CPC, CPM, CPV	Moat - (Video Ads Only) Google Ads Manager Acxiom Sales Lift Analytic Partners Media Mix Modeling Brand Effects with Nielsen
	Single Image Ad	Website visits	Automated, CPC, CPM	
	Carousel Ad	Engagement		
	Event Ad	Video views		
	Document Ad	Lead generation		
Lead Gen Forms	Lead gen forms	Website conversions Job applicants	CPC, CPM	
Text & Dynamic Ads	Text Ad Follower Ads		CPC, CPM	
Sponsored Messaging	Spotlight Ad		CPS	
	Follower Ads			





Permissions Required by Ad Type

Depending on the type of ads you will be running, you may need to request additional [access levels](#) from the client. The below chart lists the access level required for each ad product and the following [link](#) provides more information for getting started.

Access Needed For	Sponsored Content	Sponsored Message Ad	Text Ads, Dynamic Ads	Lead Gen Forms
Ad Account	Account Manager or Campaign Manager	Account Manager or Campaign Manager	Account Manager or Campaign Manager	Account Manager or Campaign Manager (to create lead gens forms)
Client's Company Page (only a current Page admins can grant access)	Co. Page Admin or Sponsored Content Poster	Not required	Not required	Co. Page Admin or Lead Gens Forms Manager (needed to view/download leads data)
Message Ad Sender	N/A	Request client's permission to add them as the Sender's Name	N/A	N/A

* This information in this chart is not global and does not apply to the EU.

Business Manager

Business Manager enables agencies to centrally manage all your Ad accounts, client Pages, and people from one place.



Why Use Business Manager?



Quickly give all your people the Ad account and client Page access they need or remove them in a click.



Seamlessly onboard and collaborate with your clients by sharing Ad accounts and Pages across Business Managers.



Reach your clients' buyers more effectively by sharing Matched Audiences across accounts.



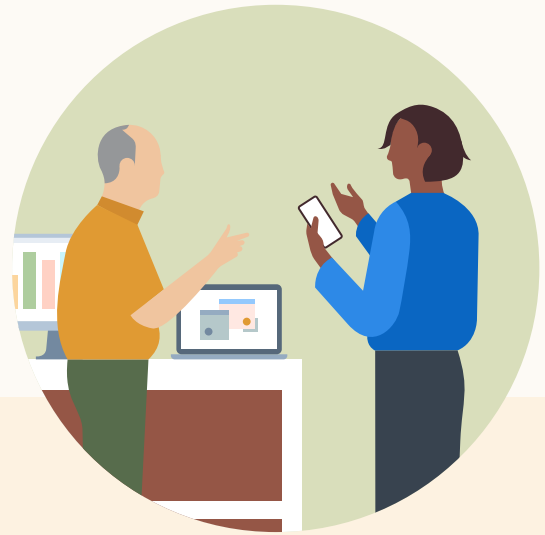
Save time managing bills by downloading all your monthly invoices from Business Manager.

Need help getting started? Check out our detailed [agency onboarding playbook](#) and share this [onboarding overview](#) with your clients.

Looking for more in-depth information? Take our Business Manager [Marketing Labs](#) learning path.

Billing

Billing tends to be a top inquiry for agencies.
Find the best resources for getting you started on the right foot.



Monthly Invoicing (recommended)



Invoicing can be set up for any individual ad account by filling out [this web form](#). Note that this is not an agency credit line—you will need to complete this form for each advertiser/account separately. With invoicing, you have the option to bill the client direct or to bill the agency. Get started by learning [how to setup invoicing](#).

Approval is based on credit history. Already paying by invoice but want to update invoicing details? Do so [here](#).

Additional Payment Methods



Credit Card: The quickest way to go live when you create an ad account online. Paying by credit card has no minimums.

Insertion Order: This contractual buy requires a dedicated LinkedIn account rep and an agreed upon upfront budget, run dates, and product type.

Questions or issues? Contact our [Billing Support Team](#).

