New Agency Onboarding Guide

Contents

Why LinkedIn Ads?

From connection to conversion, LinkedIn Ads gives your clients the tools to build relationships that fuel pipeline and growth.

LinkedIn drives real B2B outcomes

Only on LinkedIn...	Impact
#1 platform for influencing decision-makers*	Reach the people who matter most
113% Return on Ad Spend (ROAS)**	Make your clients' ad dollars go further
1.2B+ members **130M+** decision-makers **14M+** C- suites	Expand your clients' visibility and trust
69M companies	Connect your clients to the most engaged audiences

*Source: Digital Marketer Preferences Research, CMB, March 2025
**Source: Dreamdata Benchmarks Report, 2025

Getting your client started on LinkedIn Ads

If you're ready to drive measurable LinkedIn success for your client, this guide is your roadmap. It's designed to help agencies like yours confidently get started with LinkedIn Ads, equipping you with the audience access, tools, and workflows you need to deliver measurable results for your clients. From defining clear objectives to setting up campaigns that reach the right decision makers, we'll walk you through each essential step to start building relationships and driving pipeline on LinkedIn.

Four steps to getting started with LinkedIn Ads

Step 1

Understand client objectives and audience

Step 2

Access the right tools

Step 3

Build a campaign

→ Create a Page

→ Launch an ad campaign

→ Boost an organic post

Step 4

Measure, optimize, and grow

Step 1

Understand client objectives and audience

LinkedIn's massive professional membership makes it easy to reach your client's audience, see what matters to them, and engage in the conversations that influence their decisions. One of the best ways to do this is through a LinkedIn Page, which serves as the central hub for your client's brand.

From a Page, you can showcase their story, participate in relevant discussions, listen to audience feedback, and engage both employees and customers. While we'll get into the specific steps for creating and optimizing a Page later, it's important to remember that a LinkedIn Page is not the same as a LinkedIn profile: a Page represents an organization, while a profile represents an individual.

Matching client objectives to the best ad type

Whether it's building brand awareness, driving website traffic, or generating conversions, LinkedIn makes it easy to select the ad formats that best support your client's goals. By matching objectives to the right ad type, you can create campaigns that reach the right audience, encourage meaningful engagement, and deliver measurable results.

Objective category	Specific objective	Goal
Awareness	Brand awareness	Use ads to encourage interaction, announce events, build retargeting pools, and increase visibility
Consideration	Web visits	Get more people to visit your client's website
	Engagement	Drive clicks, social actions, and Company Page follows
	Video views	Tell your client's product/services or business story through video
Conversion	Lead generation	Get leads using forms pre-filled with LinkedIn member information
	Website conversions	Drive specific actions on your client's website, such as sign-ups, purchases, or downloads
	Job applicants	Encourage qualified professionals to apply to your client's open positions

Matching objectives and ad types

		Awareness	Consideration			Conversion		
Ad type	Objectives	Brand awareness	Website visits	Engagement	Video views	Lead generation	Website conversions	Job applicants
Sponsored Content	Single Image Ads	✓	✓	✓		✓	✓	✓
	Video Ads	✓	✓	✓	✓	✓	✓	
	Carousel Ads	✓	✓	✓		✓	✓	
	Document Ads	✓	✓	✓		✓	✓	
	Event Ads	✓	✓	✓		✓		
	Thought Leader Ads	✓		✓				
	Connected TV Ads	✓						
	Article & Newsletter Ads	✓		✓		✓*		
	Job Ads							✓
Lead Gen Forms	Lead Gen Forms					✓		
Dynamic & Text Ads	Text Ads	✓	✓				✓	
	Spotlight Ads	✓	✓				✓	✓
	Follower Ads	✓		✓				
Sponsored Messaging	Conversation Ads	✓	✓	✓		✓	✓	
	Message Ads		✓			✓	✓	

*Article only

Learn more about our different types of ads and how to create an ad account.

Step 2

Access the right tools

Once you and your client have decided on objectives and the corresponding ad types, the next step is to grant access to the people who will manage the campaign. Depending on the type of ads you plan to run, you may need to request additional access levels from your client to ensure your team can set up, monitor, and optimize campaigns effectively. The chart below outlines the access levels required for each ad product.

Access needed for	Sponsored Content	Dynamic & Text Ads	Lead Gen Forms
Ad Account	Account Manager or Campaign Manager	Account Manager or Campaign Manager	Account Manager or Campaign Manager (to create lead gen forms)
Client's Company Page (only current Page admins can grant access)	Company page Admin or Sponsored Content Poster	Not required	Company Page Admin or Lead Gen Forms Manager (needed to view/download leads data)

Want to dive deeper into user permissions?

- Find out which permitted actions each user role can perform.
- Learn more about the different permissions needed to create or sponsor ads.

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

Business Manager

Each client has unique goals and requirements, which is why LinkedIn designed Business Manager with flexibility in mind—allowing you to easily manage multiple Ad Accounts and Client Pages from a single dashboard.

Why use Business Manager?

- **Grant or remove access** to Ad Accounts and Client Pages for your team in a single click.
- **Share audiences** across Ad Accounts so any updates to a Matched Audience are instantly reflected wherever it's used.
- **Collaborate seamlessly** with clients by sharing Ad Accounts and Pages, letting each business manage its own team's access.
- **Download invoices** to streamline billing and save time on payment management.
- **Link accounts and Client Pages** to a single dashboard for a complete view of all campaigns.

For your agency

Learn how to optimize your LinkedIn advertising goals in this two-part Business Manager course.

For your clients

Share these handy resources with your clients to help them get started strong with Business Manager:

- Agency Onboarding Playbook
- Onboarding Overview

Step 3

Build and launch your first campaign

Create a Page

If your client doesn't yet have a LinkedIn Page, you'll need to create one to establish their presence before running any campaigns. A Page helps your client grow brand awareness, build trust with their audience, and showcase their products, services, and career opportunities.

You can create a LinkedIn Page for free, but you must have an existing LinkedIn account to begin. Before you begin, we recommend reviewing LinkedIn's best practices to ensure your client's Page is set up for success.

Tips for a complete Page

Pages with complete information see **30% more** weekly views, so make sure to include the following:

Logo and cover image
Add your client's logo and a visually engaging cover image to bring the Page to life. If they don't have a logo yet, our Content & Creative partners can support the creation of high-quality professional logos.

Overview
Lead with relevant keywords and phrases that describe your client's mission and purpose, making it easier for members to find them through search.

Organization info
Include your client's website URL, location, industry, and company size to provide a full picture of the business.

Call-to-action button
Customize the button to align with campaign goals and track clicks in the admin view or visitor analytics.

Want to know more about ensuring success with your client's Page?

Check out these resources:

- Create a Page
- LinkedIn Pages Best Practices
- LinkedIn Pages Enterprise Playbook

Launch an ad campaign

Once your client's LinkedIn Page is set up, you're ready to start advertising. Setting up a campaign can be broken down into **three clear phases**, each with simple steps to guide you from planning to launch. You can review the list below, or see a more detailed version of the instructions here.

Phase 1
Set up your campaign

Goal: Define objectives, audience, budget, and campaign structure

1. Sign in to Campaign Manager

Open LinkedIn Campaign Manager and select "Create > Campaign"

2. Select or create a Campaign Group

- Choose an existing group or create a new one
- Name the group and organize campaigns under it

3. Select your objective

- Pick the action you want your audience to take
- Supports objective-based ad formats, bid types, and workflows

4. Set campaign group budget & schedule

- Use **Dynamic Group Budget** to optimize spend across campaigns
- Optionally, set the budget later at the individual campaign level

5. Build your target audience

- Target by professional traits (job title, company, industry)
- Include interests or custom Matched Audiences (retargeting, contact targeting, account-based targeting)

6. Select Your Ad Format

- **Sponsored Content:** carousel, document, event, single image, video
- **Message Ads:** delivered to inboxes
- **Text Ads:** sidebar or feed placements
- **Choose ad placements:** LinkedIn only or expand via trusted 3rd-party publishers

7. Set Campaign Budget & Schedule

(if not done at group level)

- Define budget, bid strategy, and schedule
- Add LinkedIn Insight Tag for conversion tracking (optional)

Phase 2
Set up your ad(s)

Goal: Upload creatives and assets aligned with your objective

1. Upload images, videos, headlines, URLs, and other assets depending on ad format

2. Reference the LinkedIn Ads Guide for format-specific specifications

Phase 3
Review and launch

Goal: Ensure accuracy and go live

1. Review all campaign settings

2. Add a payment method (debit/credit card)

3. Optionally, check Forecasted Results for estimated performance

4. Submit campaign for LinkedIn review and launch

Explore these resources for more information and instructions on how to launch campaigns quickly and easily.

- Launch a Campaign
- Set Up Conversion Tracking
- How to Upload Matched Audiences
- Set Up Lead Gen Form

Boost an organic post

Amplify your client's presence on LinkedIn by boosting their organic content. LinkedIn's paid advertising options allow you to extend the reach of your client's organic content, putting it in front of a highly engaged audience and maximizing visibility on their feed.

How to boost an organic post from a LinkedIn Page

Boosting organic content is a simple way to expand reach and engagement.

Follow these steps to boost your client's organic post:

1. Access the Page

- Go to **My Pages** → click your client's Page to open admin view

2. Find the post

- Scroll through the Page feed to locate the eligible post

3. Click Boost

- Located in the upper-right corner of the post

4. Choose a campaign goal

- **Impressions:** Reach more people (recommended)
- **Engagement:** Increase awareness and interactions
- **Leads:** Collect contact info (not for document ads)

5. Select an audience template

- **Profile-based:** Job title, function, company industry
- **Interest-based:** Member groups (EEA & Switzerland note)
- **LinkedIn Audience template:** Pre-set targeting
- **Saved template:** Use previously created audience

6. Define audience attributes

- **Customize targeting;** optionally save audience for reuse

7. Advanced options (optional)

- Enable **Automatic Audience Expansion**
- Include **LinkedIn Audience Network**

8. Set campaign schedule & budget

- Choose **start/end dates and lifetime budget**

9. Lead gen form setup (if applicable)

- Select form template, fill required fields, and add a privacy URL
- **Articles/documents:** select CTA button
- **Videos:** add headline

10. Select ad account

- Use the existing Campaign Manager account or create a new one

11. Boost

- Submit the post and start reaching a wider audience

Once you've boosted a post, a campaign is automatically created in your ad account using the selected settings and ad. The campaign name will include "Boost Post," the campaign objective, and the date it was boosted.

You can review and filter boosted posts from either your LinkedIn Page or Campaign Manager by selecting the Page posts tab in the left panel of your Page.

To track performance or make changes, you can view and edit campaign settings directly in Campaign Manager. You can also edit both the boosted post and its campaign settings from your LinkedIn Page.

Whether it's paid ads or organic posts, increasing the reach of your client's content helps drive results and maximize the impact of their investment. Explore these resources to learn best practices and strategies:

- Organic + Paid Playbook
- Boosting Posts Best Practices
- LinkedIn Guide to Boosting Posts

Step 4

Measure, optimize, and grow

Once your client's campaign is live, it's time to refine and scale their success. LinkedIn offers multiple ad formats designed to help you reach your client's goals, whether that's increasing brand awareness, generating leads, or driving conversions. Below are key steps to help you measure campaign effectiveness, identify opportunities for improvement, and use data to drive better outcomes for your clients. You'll also find additional resources to help you dive deeper into specific reporting and optimization tools.

Identify your key metrics based on the campaign objectives

Objective:

Building brand awareness

Focusing on these metrics will indicate whether you're getting the desired number of views and building interest:

Clicks
The number of clicks on links in your ad.

Impressions
The number of times people saw your ad.

Click-through rate (CTR)
The number of clicks divided by impressions.

Average engagement
Total engagement (paid and free clicks) divided by impressions. Engagements can include social actions such as likes, comments, or shares.

Objective:

Driving leads and conversions

The following metrics will reveal how many people complete a sign-up, download, or purchase:

Conversions
The number of times someone took an action after clicking on or seeing your ad. This metric applies to campaigns using LinkedIn conversion tracking.

Conversion rate
How often your ads result in conversions on your website.

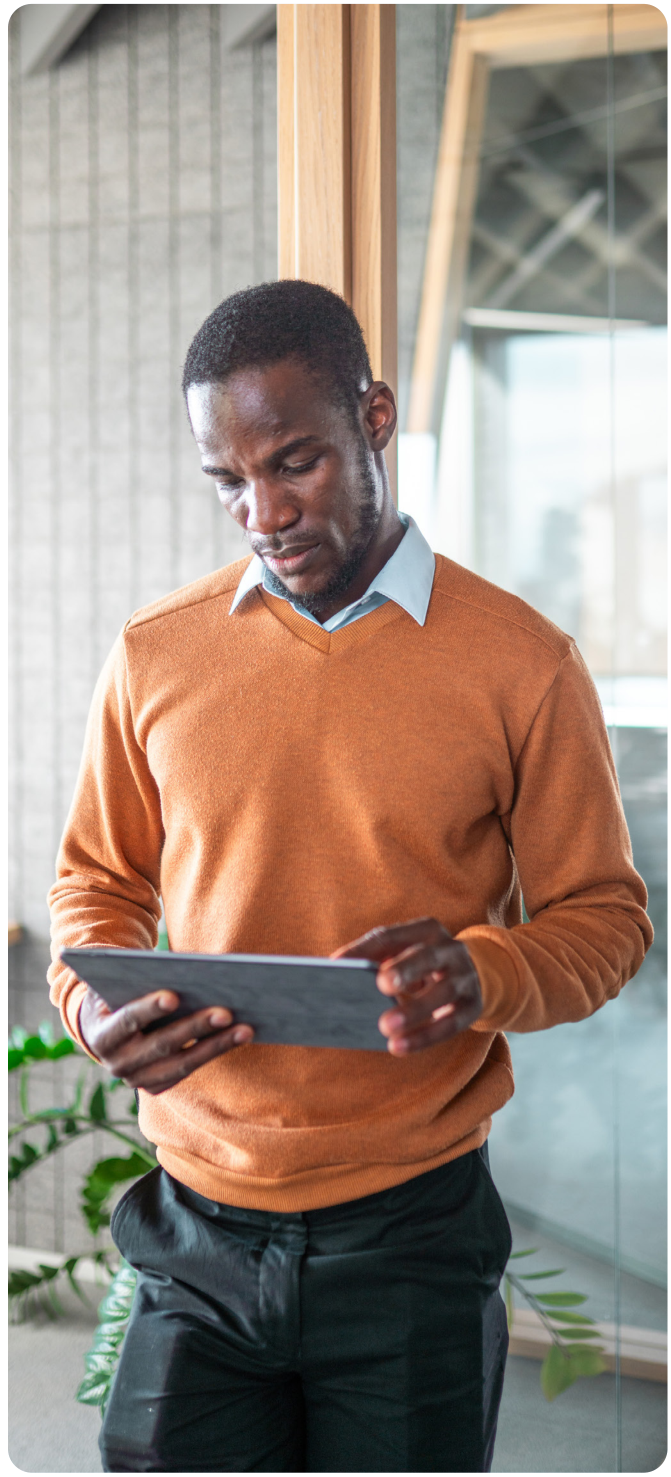
Cost per conversion
Ad spend divided by conversions.

Leads
The number of leads you get from your ads. This metric applies to campaigns using LinkedIn Lead Gen Forms.

Cost per lead (CPL)
Ad spend divided by leads. Use Qualified Leads Optimization to deliver ads to high-quality leads, lowering CPL while driving higher ROI.

Impressions analyzed
Total impressions analyzed filtered for IVT

Valid and Viewable rate
The percentage of valid impressions that were viewable under the MRC standard (50% of pixels in-view for at least 2 continuous seconds)



Learning resources

Track how much of your LinkedIn video ads are seen and heard with third-party tools like DoubleVerify and IAS.

Learn more about third-party tracking.

Set up conversion tracking and Lead Gen Forms

LinkedIn offers a range of features to help you measure bottom-of-funnel lead gen metrics.

Conversion tracking

Set up conversion tracking to measure conversions, conversion rates, and cost per conversion.

Lead Gen Forms

Set up Lead Gen Forms to measure leads and cost per lead.

Marketing Partners—Lead Gen

Find a Marketing Partner specializing in lead generation to help you get more out of the leads you generate on LinkedIn with capabilities like lead enrichment, scoring, routing, and more.

Evaluate ad performance

Access and download all your campaign data directly in Campaign Manager. Focus on the metrics that align with your campaign goals and establish a baseline by reviewing key metrics from your initial ads. Use this baseline to track progress over time and set goals for improving performance.

Explore Reporting Marketing Partners that can help you understand the performance and effectiveness of your LinkedIn Ads.

Optimize with demographic insights

Use the professional demographic data on LinkedIn to discover and target new audiences. Start by viewing who engages the most with your ads. Sort by your key metrics. Once you understand which audiences respond best to your ads, create new targeting audiences based on your findings. You can also use Audience Expansion to reach new audiences who are similar to your target audience. Just check the box underneath targeting criteria to enable this feature.

How to view demographic data

Optimize with performance insights

Access your campaign insights to see how your ads are performing and get recommendations for optimizing bids and budgets. Test different variations of your ad creative within each campaign and adjust based on which versions perform best against your key metrics. You can also boost ROI by refining your targeting and bidding strategies.

Learning resources

How to...

- View campaign metrics
- Create an A/B testing strategy
- Download campaign reports

Learning resources

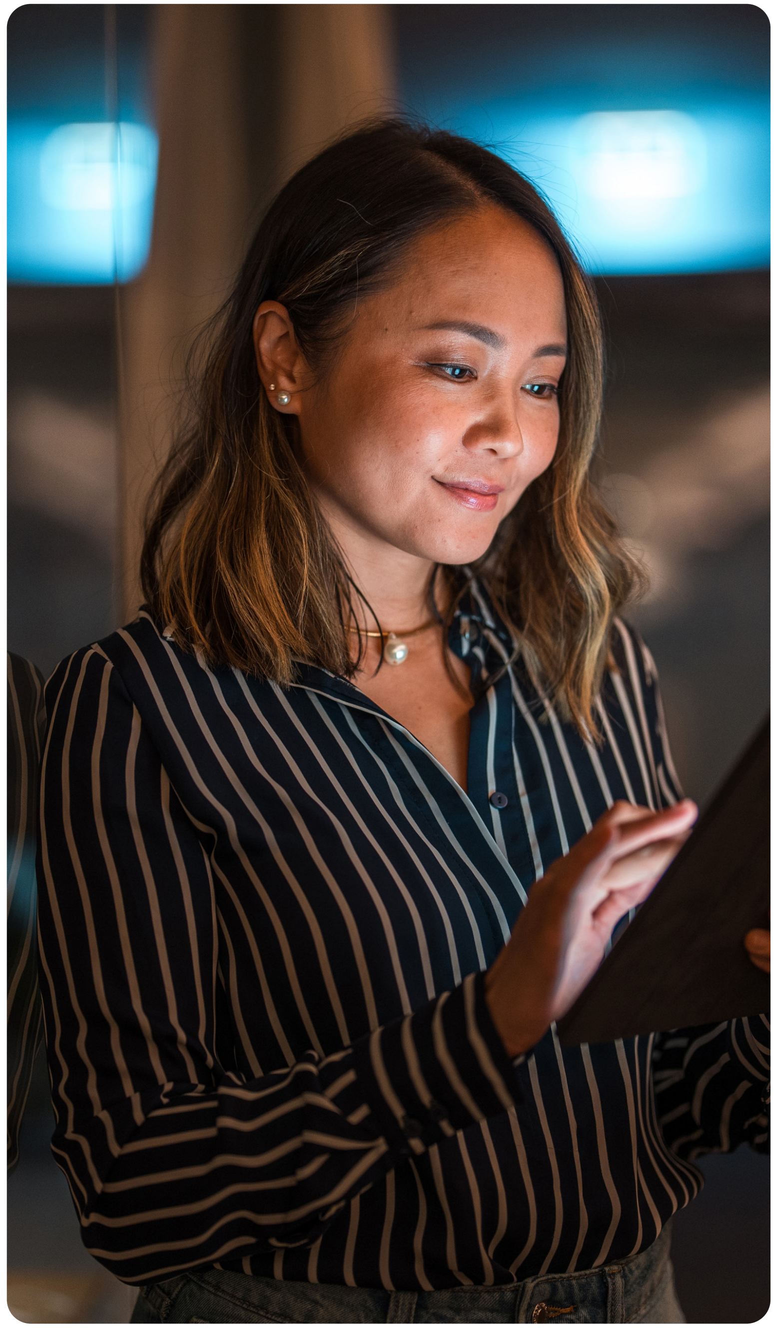
- Learn more about campaign insights
- Sponsored Content tips
- Message Ads tips
- Text Ads tips

Billing

Having a clear understanding of how to set up and manage payments helps you stay organized, avoid delays, and keep campaigns running smoothly. Here are the different ways you can set up billing to keep things simple, efficient, and tailored to your agency and all of your clients' needs.

Monthly invoicing

Monthly invoicing lets advertisers pay for their LinkedIn advertising on a recurring basis. LinkedIn now offers an enhanced self-serve experience, making it easier for agencies and clients to share and manage payment methods directly within Business Manager. You can set up billing with either direct or sequential liability, depending on local regulations. Note that Business Manager is required if you want to request invoicing. To determine which option works best for your needs, check out this guide.



Ready to get started?

Follow these simple steps to set up monthly invoicing.

Payment methods and support

Credit card
The fastest way to get an Ad Account live online, with no minimum spend required.

If you have any questions or run into issues, contact the Billing Support Team for assistance.

LinkedIn Growth Hub for Agencies

Find everything your agency needs to run successful LinkedIn campaigns in one place. Access guides, training, tools like Business Manager, and resources to optimize client campaigns, measure results, and drive ROI.

Explore Growth Hub for Agencies

Learning and education tools

LinkedIn Marketing Labs
Learn the science of marketing professionals. Experiment, learn, and get the most out of free online training.

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 setup, optimizations, or troubleshooting.

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

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

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.

Targeting Playbook
Learn how LinkedIn Targeting works—and how to get the most out 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 varies by the ad format and the chosen optimization goal.

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.

Marketing Partner Directory
Trusted solutions to help you market your clients' businesses on LinkedIn.