THE COMPREHENSIVE LINKEDIN ADS STARTUP CHECKLIST & GUIDE

EVERYTHING YOU NEED TO GET YOUR LINKEDIN ADS RUNNING LIKE A PRO



By AJ Wilcox, Host of the LinkedIn Ads Show & Founder B2Linked.com

Saying that getting started advertising on any new platform is stressful is an understatement.

Especially so with LinkedIn because we pay a premium to advertise there, so any mistake quickly becomes expensive.

That's why we put this checklist together for you.

With these instructions, you'll get started fast, and have the confidence that you launched your campaigns like the pros.

We've spent over \$200M on LinkedIn Ads in our 11+ years, so we know all the pitfalls new advertisers fall into, and we've crafted this guide especially to help you avoid them.

And please feel free to <u>reach out to me, personally</u>, on LinkedIn and let me know any corrections or suggestions as you use this guide.

We're excited about continuing to make it more useful to new advertisers.

AJ Wilcox CEO - B2Linked



THE COMPREHENSIVE LINKEDIN ADS STARTUP CHECKLIST 15 STEPS TO HIGH-PERFORMING LINKEDIN ADS

STEPS TO GET YOU STARTED

□1	GET ACCESS TO YOUR LINKEDIN COMPANY PAGE	□2	GET ACCESS TO YOUR LINKEDIN ADS ACCOUNT
	Have someone on your team who already has Company Page permissions grant you access to the Page in order to create all ad types.		Have someone on your team who already has Admin permissions grant you access to the company's Ad Account.
	This could live in Business Manager or directly on the company's Page. If you don't already have a Company Page, you'll create one.		If the ad account has previously been associated to a Business Manager, that will have to be done through Business Manager, but if not, it can be done directly within the ad account. If you don't already have an Ad Account, you'll create one.
□3	SET UP BILLING	4	INSTALL THE LINKEDIN INSIGHT TAG
	Set up your Ad Account with credit card information in order to run ads. Note that only the Account Manager listed on the Account as the Billing Admin can complete this step.		Install the LinkedIn Insight Tag on every page of your website. This will allow you to track conversions and enable retargeting audiences.
□5	SET UP CONVERSIONS	□ 6	CONSIDER YOUR TARGET AUDIENCE
	After completing Step #4, track when users complete a certain goal after clicking on your LinkedIn Ads by creating what's called a Conversion.		Define your ideal target audience by deciding what sorts of job titles they might have and in what sizes of company, and which industries they might work in.
□7	CHOOSE THE CORRECT OBJECTIVE	□8	SET UP CAMPAIGNS THE RIGHT WAY
	When starting your first campaign, LinkedIn will force you to select an objective. Choose the objective that will provide the best cost/performance. I'll give you		Create LinkedIn Ad campaigns based on the audience you've defined. Uncheck Audience Expansion as well as LinkedIn Audience

Network, and bid manually by clicks to start. Bid much lower than LinkedIn suggests, to begin.

guidance for this down below.

9 CONSIDER YOUR OFFER

In the beginning stages of your LinkedIn Ads strategy, build affinity for your brand through ads that either add value and build relationships through content or educate on who you are and what problems you solve.

TABLE 1 GATHER IMAGERY FOR YOUR ADS

Imagery should stand out and draw attention to your message. Try to avoid colors that would blend in with LinkedIn's color scheme, like blues, grays, and whites.

$\boxed{}$ $\boxed{1}$ $\boxed{0}$ craft your message

Write ad copy that addresses a customer pain point, offers a solution, and includes a call-to-action. A/B test between different variations of messaging to find which resonates most with your audience.

12 LAUNCH YOUR ADS

Combine the offer, messaging, and imagery that you put together to launch ads in the campaigns you created previously.

ADDITIONAL STEPS (RECOMMENDED)

☐ 13 PLAN A HOLISTIC LINKEDIN ADS STRATEGY

Plan a holistic LinkedIn Ads strategy tailored to the B2B buyer's journey. Structure it around three stages: Build Awareness, Build Affinity, and Build Trust.

$\Box 15$ optimize and scale

Keep a close eye on ads as they run and make changes if performance isn't up to par. Use resources like the <u>podcast</u> and <u>blog</u> found at <u>B2Linked.com</u> for helpful LinkedIn Ads tips and tricks.

14 CREATE MATCHED AUDIENCES

Build Matched Audiences that can be targeted in your holistic LinkedIn Ads strategy. Create them early so they have time to build and collect data.



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STEPS TO GET YOU STARTED



GET ACCESS TO YOUR LINKEDIN COMPANY PAGE

Before you can even create ads on LinkedIn Campaign Manager, you first need permissions to access/manage your LinkedIn Company Page. There are 2 ways to do this, based on whether or not someone previously has linked the company Page to a LinkedIn Business Manager.

To tell if your permissions live in Business Manager or not:

Whoever has admin access will visit your company's Page. Have them click:

Settings > Manage admins > + Add admin

If it doesn't show a message about these being managed inside of Business Manager, that means you manage it directly from the page.



If you don't manage the Page through Business Manager:

Type the name of the person to be added and select **Super admin** to grant full access and click **Save** (the person being added might have to already be a follower of the company's Page for this to work).

If granting to a non-employee like an agency:

Click the tab for "Paid Media Admins" and add them there instead with these permissions:

- · Sponsored content poster This allows them to create ads within Campaign Manager
- · Lead gen forms manager This allows them to create and manage Lead Gen Forms
- Landing Page admin This doesn't do anything yet, but might allow us to create landing pages in the future right on LinkedIn

If the Page is managed through Business Manager:

Have an admin of the Business Manager log into Business Manager:

https://www.linkedin.com/marketing/businessmanager/

If you're an employee:

Click **People** > **Invite People** > Type your email address, and invite as an **Admin**.

Within a few minutes, you should have an email from LinkedIn saying that you've been granted access to a Business Manager. Accept that invitation. Then have the admin navigate to **Pages** > Click your company's page > **Add People** > and then click your name and grant you SuperAdmin access.

If you're an agency or consultant:

You'll need to create your own Business Manager, and make note of your Business Manager ID.

Have the admin log into their Business Manager, click on **Partners**, and enter your Business Manager ID into the field and click **Add partner**.

Partners (24)	Enter Business Manager ID Add	partner
Search partner name or ID		

Then have the admin navigate to **Partners** > Click your Business Manager Name > Under the tab **You shared**, click **Share pages** > and click **Assign Role** next to your Business Manager name.

Have them select the appropriate level of permissions (Either SuperAdmin or the three toggles under *Manage paid media content*).

For more on Business Manager and how to create one for your company, click here:

https://business.linkedin.com/marketing-solutions/business-manager

Also, if your company doesn't already have a Page, you can create one here: https://www.linkedin.com/company/setup/new/



GET ACCESS TO YOUR LINKEDIN ADS ACCOUNT

Similar to Step #1, you can't yet create campaigns or ads until you also have permissions to access/manage your company LinkedIn Ads Account. To do this, have someone within your organization who already has Admin access add you to the Account.

They can again do this one of two ways, and how you do it depends on whether someone has previously linked the Campaign Manager account to a Business Manager or not.

To tell if your Campaign Manager lives in Business Manager or not:

Whoever has admin access will visit the LinkedIn Ads account

https://www.linkedin.com/campaignmanager/accounts

Once in the Ad Account, have them click: **Account Settings** > **Manage Access** >

Manage access

User permissions of this ad account are managed through Business Manager now. Learn more

If you see this message about user permissions being managed through Business Manager, you know you need to go through Business Manager. I'll cover it in the next section.

If it doesn't show that message, have them click **+ Add User** there, and search for your name, and click your LinkedIn profile and grant the desired permissions.

Here are the breakdowns of what access levels do what.

- **Billing Admin:** Only 1 per account. This is the one who is responsible for managing the credit card or invoicing. Visible only for those already set to Account Manager.
- Account Manager: Full admin. Can add/remove users from the account, and can do anything in the ads account.
- · Campaign Manager: Full control of the account but just can't add/remove other users.
- Creative Manager: User can add and edit ads, but can't edit/create campaigns.
- Viewer: Can only view campaigns and ads, but can make no changes.

Granting Access through Business Manager

Have an admin of the Business Manager log into Business Manager: https://www.linkedin.com/marketing/businessmanager/

If you're an employee, click **People** > **Invite People** > Type your email address, and **invite** as an Admin Within a few minutes, you should have an email from LinkedIn saying that you've been granted access to a Business Manager. Accept that invitation.

Then have the admin navigate to **Ad Accounts** > Click your company's ad account > **Add People** > and then click your name and grant you SuperAdmin access.

If you're an agency or consultant, you'll need to create your own Business Manager, and make note of your Business Manager ID (you likely already did this in Step 1 for the company's Page).

Have the admin log into their Business Manager, click on **Partners**, and enter your Business Manager ID into the field and click **Add partner**.



Then have the admin navigate to **Partners** > Click your Business Manager Name > Under the tab **You shared**, click **Ad Accounts** > and click **Assign Role** next to your Business Manager name.

Have them select the appropriate level of permissions (*Campaign Manager* is usually fine but *Account Manager* is full admin.)

If your company doesn't already have an Ads Account, you can create one here: https://business.linkedin.com/marketing-solutions/ads



If your organization has not yet set up your Ad Account with credit card information, you'll need to do that before LinkedIn will allow you to run ads. Note that only the Account Manager listed on the Account as the Billing Admin can complete this step.

From within LinkedIn Ads Campaign Manager, click **Account Settings** > **Billing** and follow the prompts to enter a credit card.

If you prefer monthly invoicing rather than periodic credit card billing, you can apply for it through Business Manager.





INSTALL THE LINKEDIN INSIGHT TAG

This is a crucial step to setting up your LinkedIn Ads. In order to track conversions on your website and enable website retargeting audiences, this tag needs to be installed properly.

To install the tag, go to your LinkedIn Ads Account and click **Data** > **Signals Manager** > **Insight Tag**. From here, there are a few different methods of installing it. We recommend clicking on the option **I will install the tag myself**.

Choose how to install your tag



By using these features, I agree to the **Ads Agreement** and will not install the Insight Tag on web pages that collect or contain **sensitive data**. This can include pages offering specific health-related or financial services to consumers. Please consult with your webmaster and legal counsel to determine which pages may or may not collect sensitive data. **Learn more**.

Next, copy the code and paste it in your website's global footer, right above the closing HTML **<body>** tag. Installing it here allows you to track conversions or retarget across any page of your website.

If you don't want to go through the hassle of delving into your website's code, you can also install and set up the

tag to fire on all pages of your website via **Google Tag Manager**.



SET UP CONVERSIONS

If you want to track when users complete a certain goal after clicking on your LinkedIn Ads, you can do so by creating what's called a Conversion. Note that you'll need to complete Step #4 first in order to do this.



To create a Conversion, go to your LinkedIn Ads Account and click **Measurement > Conversion Tracking > Create Conversion > Insight Tag Conversion**.

What follows is a 3-step setup process which includes naming your Conversion, assigning an attribution model, selecting which campaigns you'd like to track the Conversion, and defining your conversion tracking method.

Step 1: Settings

Name your conversion - I like to be verbose here and explain the exact conversion action I'm tracking. I'll also include who created it and the date. So my conversion name might look like this:

All Thank-You Page Visits | AJ | 25-06-09

- **Select the category:** Required, but doesn't matter much. Just pick whichever most closely aligns with what kind of conversion you're tracking.
- Conversion Value: Optional
- Select the timeframe: I just use the default 30 days/7 days
- Attribution Model: I highly recommend Last Touch Last Campaign, otherwise it'll double-count conversions.

Step 2: Sources

There are many different combinations you can do here, but I'll list my 3 favorites:

Website Actions > Buttons. This lets you call it a conversion when a button with a certain name on it gets clicked. I use this when there is no thank-you page set up for after the conversion. You can select the button name from the list or search for it.

Website Actions > Pages. This lets you call any visit to a page a conversion. Just select the page name from the list or search for it.

Manual Conversions Setup > Page Load. Simply copy your Thank-You page URL and paste it in the available box under *Page Load Conversion*. We recommend changing the *starts with* parameter to *contains* and only including the snippet of your Thank-You page URL that is unique and distinguishes it as the Thank-You page.

Review your selections on the next page and then click **Next step**.

Step 3: Review

In the *Campaigns* section, click *Edit*, and you can associate this new conversion event with any existing campaigns you want.

Be liberal here with campaigns that you're connecting it to because there's no downside to associating too many conversion events with too many campaigns. It will only fire the conversion action if someone clicks the ad and then completes that action.



CONSIDER YOUR TARGET AUDIENCE

The reason why we're willing to pay a premium on LinkedIn Ads is because of the platform's targeting potential for B2B companies. This is, by far, the best part. Aside from targeting by Location and Profile Language (the first two steps to defining your audience), there are 30+ different categories of criteria you can play with.

We recommend starting with a base targeting criteria and then layering on additional criteria to further define your audience. For example, if your target audience has roles in Human Resources, then you might select HR-related skills or the HR job function as your base targeting criteria. You could then layer on additional criteria, such as seniority, industry, and company size after that.



We also recommend segmenting your audience. For example, if you want to target users with varying levels of seniority or companies of varying sizes, consider breaking your audience up into more than one campaign. When setting up your targeting in this way, you can essentially get focus group-level insights than if you were to lump targeting all together in one campaign.



CHOOSE THE CORRECT OBJECTIVE

When starting your campaign, LinkedIn will force you to select an objective. This is confusing because the objective name won't necessarily match the objective that you would naturally choose. Here's some basic guidance based off of what you want the LinkedIn Ads to accomplish:

Want to send traffic to your website or landing page?

Use **Website Visits** objective (and avoid **Website Conversions** until you're driving 50-100 conversions per week).

Want to use LinkedIn's native lead generation forms?

Use **Lead Generation** objective, because that's the only objective where that's enabled.

Want to sponsor a personal post (a Thought Leader Ad)?

Choose **Engagement** objective (and avoid **Brand Awareness**).



Avoid these objectives at all costs:

Brand Awareness - Forces you to bid by the impression, which is the most expensive way to pay for your LinkedIn traffic. Only use for Connected TV (CTV) Ads.

Website Conversions - It sounds great because we all want conversions, but it charges a premium of 10-20% for the clicks, and needs an extreme amount of conversions to build its model to make it able to cater to those who are most likely to click.

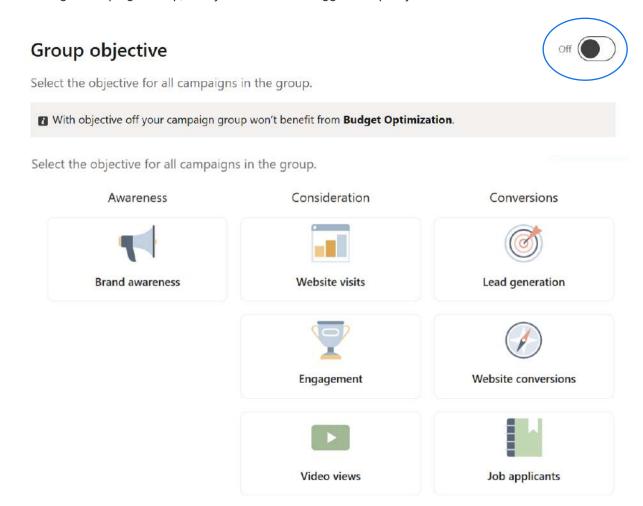


SET UP CAMPAIGNS THE RIGHT WAY

Once you have an idea of the audience you want to target, the next step is to create campaigns. In LinkedIn Campaign Manager, first click on your Ad Account and then select the Campaign Group you'd like to create campaigns in (this can be the Default Campaign Group or you can create a new one).

Important note:

When creating a Campaign Group, always remember to toggle Group Objective off.



Leaving it on will force all campaigns you create to share the same objective, which is problematic.

- Next, click the blue **Create** button on the left side and select **Campaign**.
- Select your campaign objective and click Next.
- Under **Select your campaign type**, select **Classic** which will give you full control.
- Go through the steps of confirming which Campaign Group you want the new Campaign to live under. Define
 your target audience by selecting Audience attributes and then using Narrow to add additional targeting
 facets.
- We recommend starting with AND's (when they say AND in between the targeting facets, they're combined together, making the audience more targeted. When they say OR between them, that's making the audience less targeted).
- At the bottom of the Audience section is a little checkbox titled Enable Audience Expansion.
 ALWAYS uncheck this box.
- Next, select your desired ad format.
- Under *Placements* LinkedIn will automatically include *LinkedIn Audience Network*.
 Always uncheck that to start.

Budget and Bid

The **Budget & schedule** section is one of the most important as it instructs LinkedIn how you want to pay for your ad interactions from this campaign.

Budget: We recommend setting a Daily Budget (note that if you're bidding too aggressively, LinkedIn will allow itself to overspend your daily budget by up to 50%).

Bidding:

- · Click Show additional options > Manual Bidding
- · Uncheck Enable bid adjustment for high-value clicks.
- · Select a manual bid.

We recommend bidding lower than LinkedIn's recommended bidding range, as their recommendations often result in needlessly high costs.

We suggest starting out bidding low (\$7 per website click) and, if your campaigns are having a hard time spending their full daily budgets, incrementally increase your bids 1x-2x per week.

The final step is to attach a Conversion to your campaign, if you didn't already do this in Step #5.

Once finished, click either Save and Exit or click Next if you want to move on to creating ads.

CONSIDER YOUR OFFER

Before you create your ads, you need to consider what it is you're going to offer your target audience. Your offer is a combination of the thing you're promoting and your call-to-action (what you're asking your target audience to do).

95% of the time, a cold audience isn't willing to convert on something high-friction, like a Demo Request. You need to warm your audience up first before they're ready to buy in, so the perceived value of your starting offer needs to outweigh its perceived friction.

Promote an offer that teaches your audience something new, solves a major pain point, or helps them do their job better in some way. This can be done by educating them on the problems your business solves, who you service, and how you're different from the competition with the call-to-action to learn more. It can also be done through assets that add value and build relationships like eBooks, webinars, podcasts, online communities, etc.

This is, by far, the most important part of your LinkedIn Ads strategy.



CRAFT YOUR MESSAGE

Once you've selected your offer, you're ready to start crafting your ad messaging. When writing ad copy on LinkedIn, just like any digital ad platform, you want to communicate your message in a way that addresses a pain point.

Identify what it is your target audience struggles with, what challenges they face, and how your offer is a solution to those problems. Revolve your ad copy around that pain point and solution. Somewhere in your ad copy, be sure to also include a clear call-to-action.

We also recommend A/B testing different variations of ad messaging to find which variation resonates with your audience the most and which drives results.

AD LENGTH RECOMMENDATIONS

DYNAMIC ADS

Headline - 50 characters Description - 70 characters

SPONSORED MESSAGING ADS

Subject - 60 or fewer characters Message - 300 or fewer characters

TEXT ADS

Headline - 25 characters Description - 75 characters

Intro - 160 or fewer characters Headline - 70 or fewer characters

SPONSORED CONTENT (NEWSFEED)

Intro - 160 or fewer characters (to show up without them having to click "... More" but you can go up to 600) **Headline -** 70 or fewer characters

DYNAMIC ADS

Headline - 50 characters **Description -** 70 characters

SPONSORED MESSAGING ADS

Subject - 60 or fewer characters

Message - Recommend keeping this short like a text message, but can go to 1800+ characters

TEXT ADS

Headline - 25 characters **Description -** 75 characters

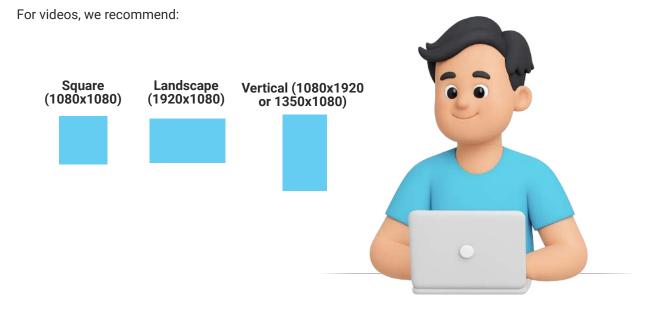


GATHER VISUALS FOR YOUR ADS

The purpose of imagery on LinkedIn is to stand out and draw attention to your overall ad message. For this reason, we recommend avoiding colors that would blend in with LinkedIn's color scheme, such as blues and whites.

Instead, use colors in your imagery that "pop" on the platform, like reds, greens, oranges, and yellows. We've seen all different types of imagery perform well, so conduct tests to find which of your images work best!

We recommend 1200 pixel x 1200 pixel (square) imagery for Single Image ads, but you can choose to use landscape (1200x628) or vertical (628x1200 or 960x1200).



12 LAUNCH YOUR ADS

The moment you've been waiting for! To build your ads, go back to the campaigns you created in Step #8. Hover over the Campaign name and some settings will appear directly under. Click + Ad.

From here, click *Create new ad*. Craft your ad by typing up your ad copy, uploading your creative, pasting in your destination URL (if applicable), and naming your ad. When you're finished, click the blue *Create* button. Repeat this process if there are more ads in a given campaign you want to create.

Click the blue **Next** button at the bottom of your list of newly drafted ads, then click **Launch Campaign**.



ADDITIONAL STEPS (RECOMMENDED)

The first 12 steps were to simply help you get started on Linkedln Ads as quickly as possible. However, there are a few more things you might want to consider doing before getting ads up and running.

Here are 3 more crucial steps to getting started on LinkedIn Ads:



PLAN A HOLISTIC LINKEDIN ADS STRATEGY

If your audience is just hearing about you for the first time, it's unlikely that they'll want to buy your high-ticket product or service after seeing one or two ads from you. You'll need to plan a holistic strategy in order to see a positive ROI.

Our holistic approach to LinkedIn Ads is divided into three stages, tailored to the way B2B consumers buy online today:

Stage 01- Build Awareness: At this stage, thought leadership and education are of the utmost importance. It's about reaching your prospects where they are, catching their attention, and positioning your brand as the only reasonable solution to their problems. It may require leveraging content like video clips, podcasts, newsletters, blog posts, eBooks, checklists, live streams, etc. Include references to your brand positioning here (who you service, how you're different, what problems you solve, and how your product works).

Remember: The vast majority of B2B buyers end up purchasing a solution they're already aware of, so it's important that they know about you before they need you.

Stage 02 - Build Affinity: This stage is focused on helping your warm audiences build confidence in your company and solutions. It leverages paid retargeting methods to further promote your business as the only reasonable solution to their unique challenges and encourages them to learn more with (preferably ungated) content like: webinars, longer videos, guides, eBooks, podcast epsiodes, etc.

Stage 03 - Build Trust: This stage is focused on reaching your warmest audiences who, now after at least 2 positive interactions with your brand, know, like, and trust your brand. Now we want to remind them about our brand until they're ready to book a demo/consultation, start a free trial, or buy something.

Feel free to include direct calls to action (CTAs) from the ads, but also consider sprinkling social proof like testimonials, reviews, case studies, and high-engagement posts.



CREATE MATCHED AUDIENCES / RETARGETING

To execute a holistic LinkedIn Ads strategy, you'll need to define which audiences are warm so you can retarget them separately.

To do so, click **Plan > Audiences > Create Audience > Matched Audience.** Then select the type of engagement that defines that audience.

Our favorite options:

Company / Contact - Select if you want to upload a list of either individuals or companies that you want to explicitly target (or exclude). **Website -** Select if you want to create a retargeting audience of those who have visited your website.

Video - Select if you want to target anyone who's watched a certain percentage of your video ads (we recommend 50% of videos under 40 seconds, and 25% of videos longer than 40 seconds).

Single Image - Select to target those who have engaged with your Single Image Ads

Document - Select to target those who have engaged with one of your Document Ads

Lead gen form - Select to target those who've opened your lead forms, or even submitted them.



When you save this retargeting audience, LinkedIn will start to build them. They will show *Building* under Status and may show as being <300 members for up to 72 hours. In order to use these audiences for targeting, they must be over 300 individuals (combined). Even if the audiences are smaller than 300 people, though, you can use them as exclusions.

Also know that Matched Audiences built from website traffic cannot be built retroactively and require the Insight Tag to be installed properly. So create the Matched Audience and install the tag as early as possible in order to collect enough data for LinkedIn to create an audience around. All the other retargeting types can be built retroactively because they happened on LinkedIn while logged in, so LinkedIn remembers them.

When building a website retargeting audience, we recommend changing the **starts with** parameter to **contains** and only including the snippet of your URL that is unique and distinguishes it from all other web pages (similar to what was mentioned in Step #5).

15 OPTIMIZE AND SCALE

Once ads are live, you'll need to keep a close eye on them to ensure they're performing well. All prior steps were to help you get started on LinkedIn Ads, but you'll need additional knowledge and tools if you want to see long-term

success.



The good news? This Checklist is just the tip of the iceberg. We have loads of resources available to help you get the most out of LinkedIn Ads. Check out the <u>blog, podcast, and YouTube channel</u> for more helpful LinkedIn Ads tips and tricks. Also consider following our founder, <u>AJ Wilcox on LinkedIn</u>.

Website: https://B2Linked.com/

Also, if you want to get more sales opportunities with your ideal prospects but don't have the time or motivation to manage LinkedIn Ads yourself, B2Linked specializes in helping B2B companies grow through custom-tailored LinkedIn Ads strategies.

We differ from other agencies because we're focused entirely on LinkedIn Ads performance and your account is managed only by US-based experts.

Book a Discovery Call with a LinkedIn Ads expert today: https://B2Linked.com/contact

Cheering you on in your LinkedIn Ads initiatives!