

Conduct Paid Media Optimizations in HubSpot

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Created by

LP Team

Creation Date

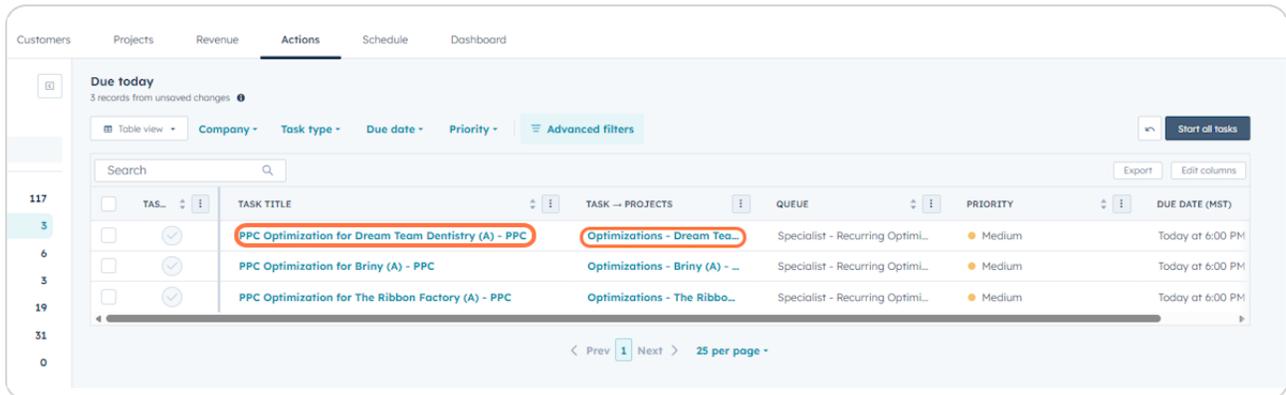
Dec 10, 2025

Last Updated

Jan 13, 2026

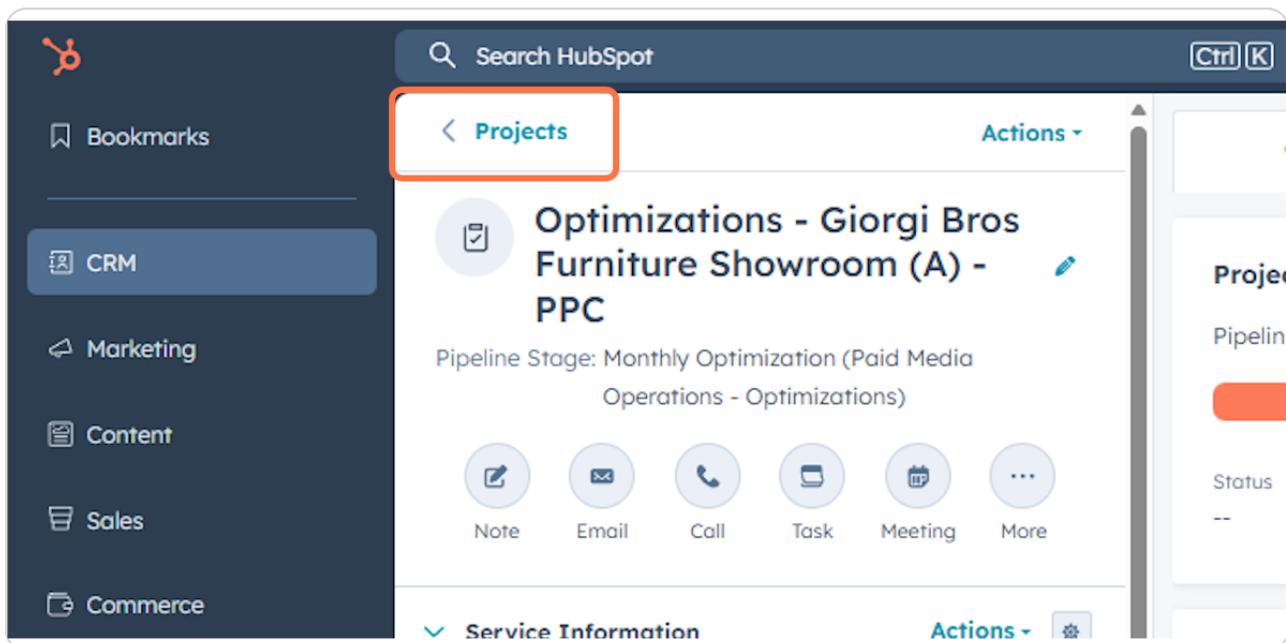
STEP 1

Begin your Optimization by clicking into the Project or into the Task record associated with the Project.



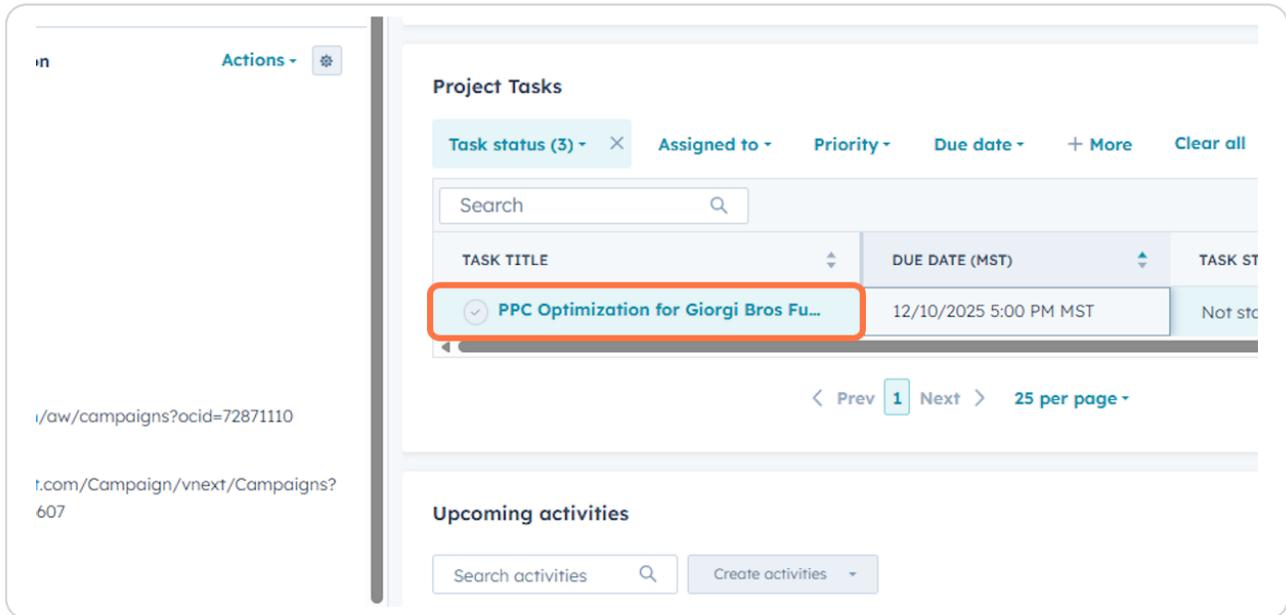
STEP 2

You can identify that you are on a Project record by looking at the top left corner of the page.



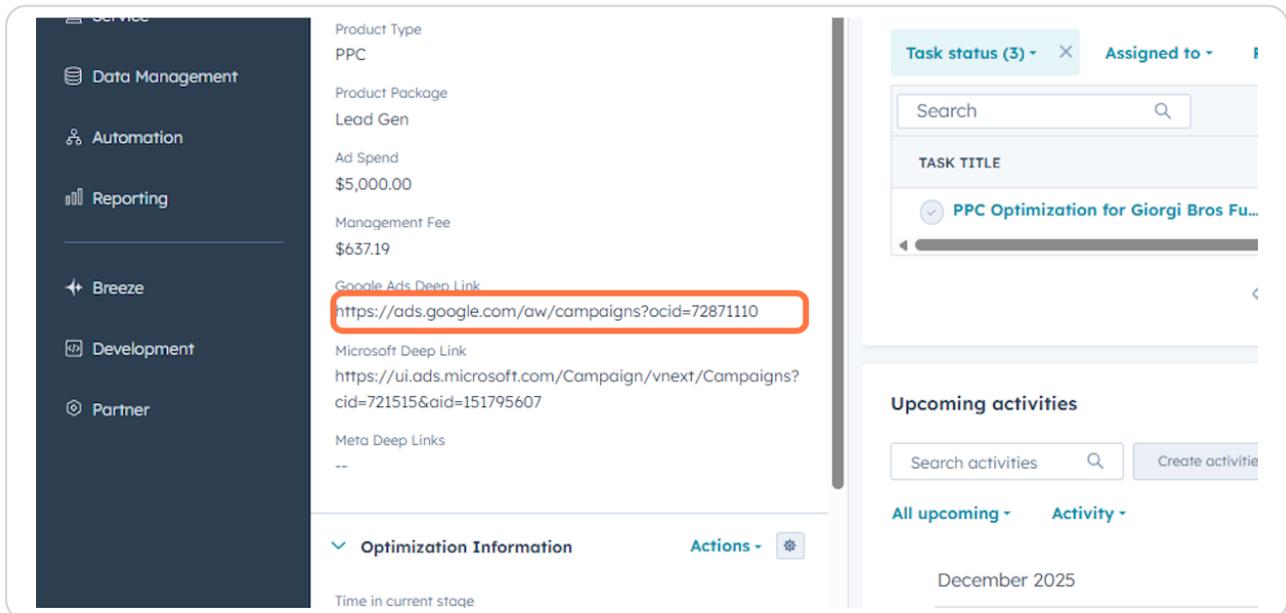
STEP 3

Your task will show in the center of the page. You can also see your tasks by clicking into the "Activities" tab.



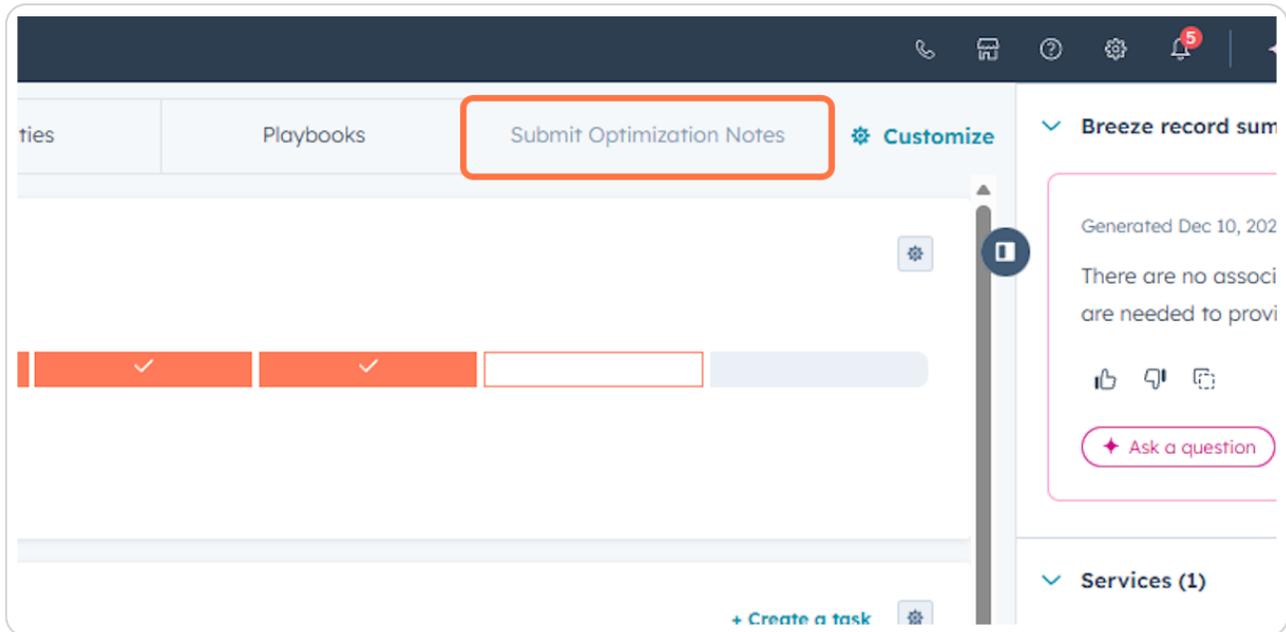
STEP 4

You can access a deep link directly to the Google Ads/Microsoft/Meta platform by using the link on the left side-bar.



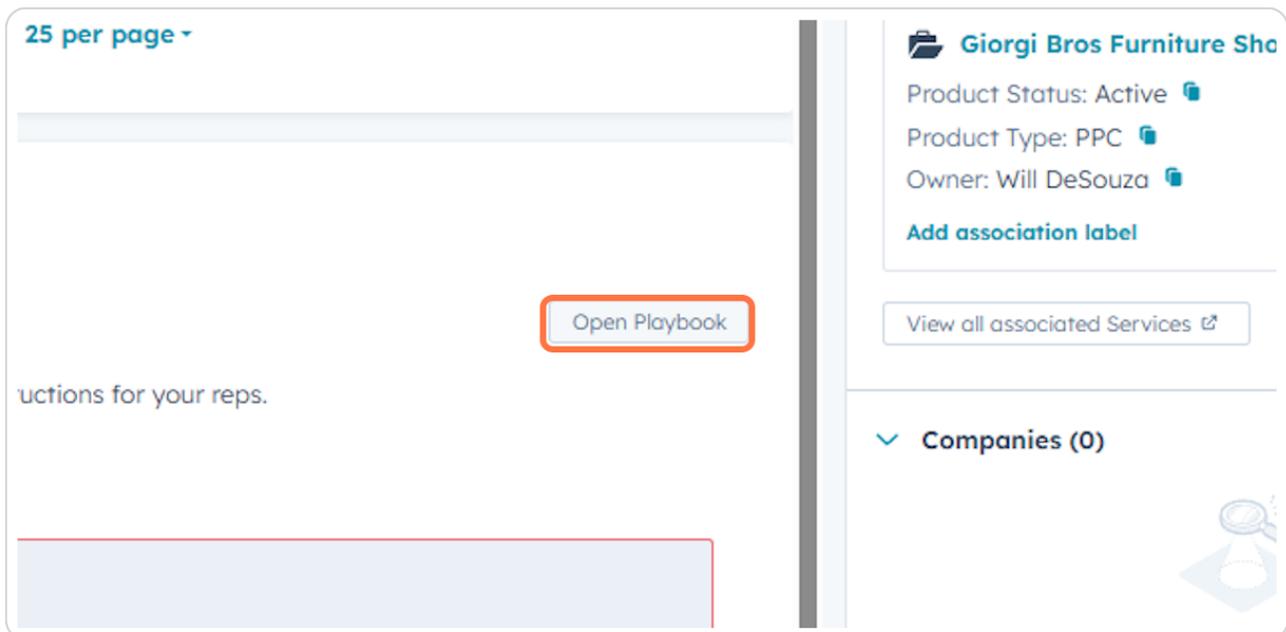
STEP 5

Once you are ready to begin notating your optimization, click into the "Submit Optimization Notes" tab in the top of the central column.



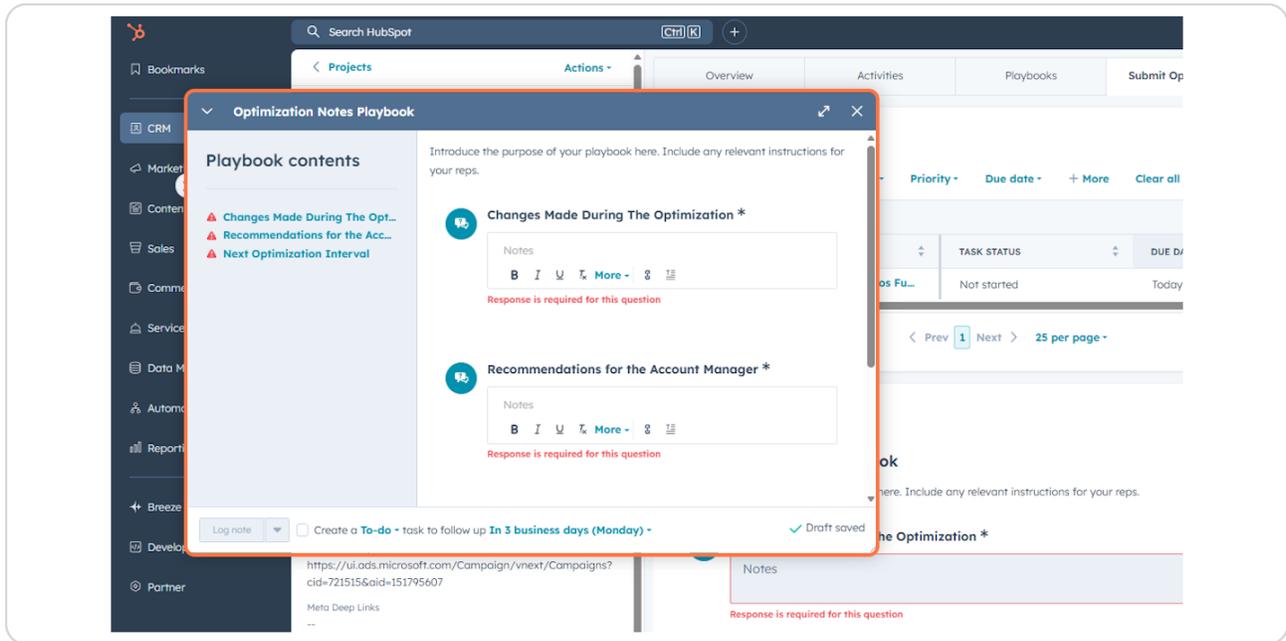
STEP 6

Select Open Playbook in the Recommended Enablement Card.



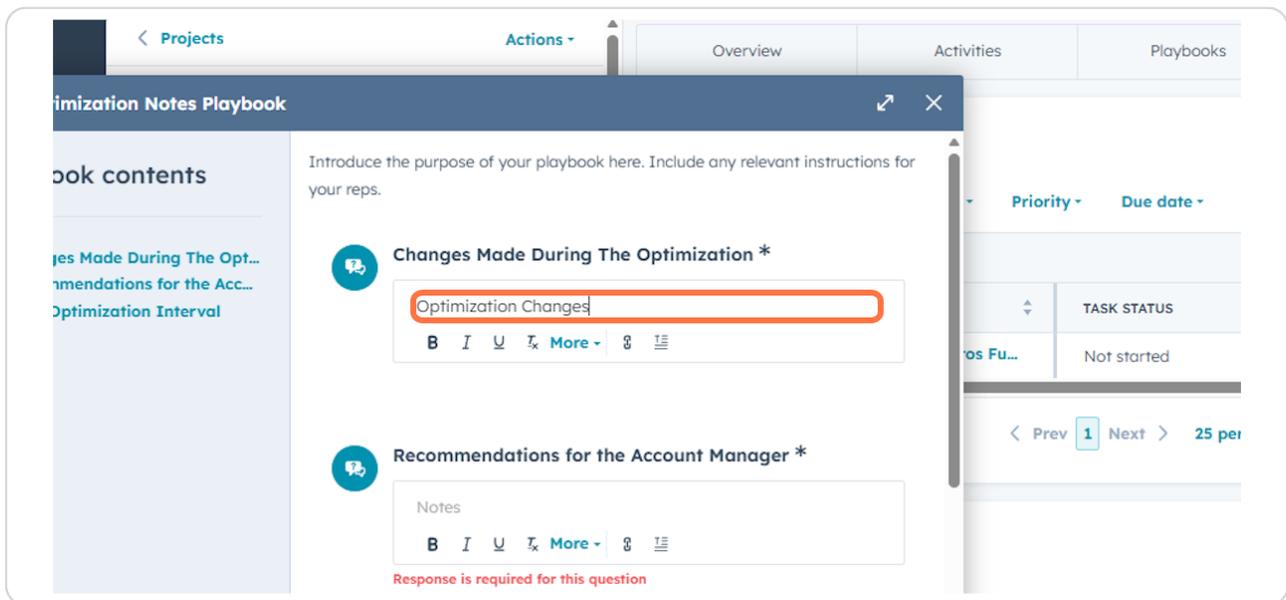
STEP 7

This action will open a HubSpot Playbook with open text fields for you to record your Optimization notes.



STEP 8

As you make changes in platform, notate your changes in the provided text boxes



STEP 9

As you come across recommendations you wish to make to the AM, notate your recommendations in the provided text box.

Changes Made During The Optimization *

Optimization Changes

B *I* U **T** More -

Recommendations for the Account Manager *

Optimization Recommendations

B *I* U **T** More -

Next Optimization Interval *

Create a To-do task to follow up In 3 business days (Monday) - ✓ Draft saved

<https://ui.ads.microsoft.com/Campaign/vnext/Campaigns?cid=721515&aid=151795607>

Notes

STEP 10

If you wish to create a follow-up task related to this Optimization you just completed, mark the check box at the bottom of the window and select a follow-up date.

Update Project property (Pipeline Stage)

Monthly Optimization

Explain Why

B *I* U **T** More -

Create a To-do task to follow up In 3 business days (Monday) - ✓ Draft saved

<https://ui.ads.microsoft.com/Campaign/vnext/Campaigns?cid=721515&aid=151795607>

Meta Deep Links

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Optimization Information Actions -

Time in current stage

1.6 days

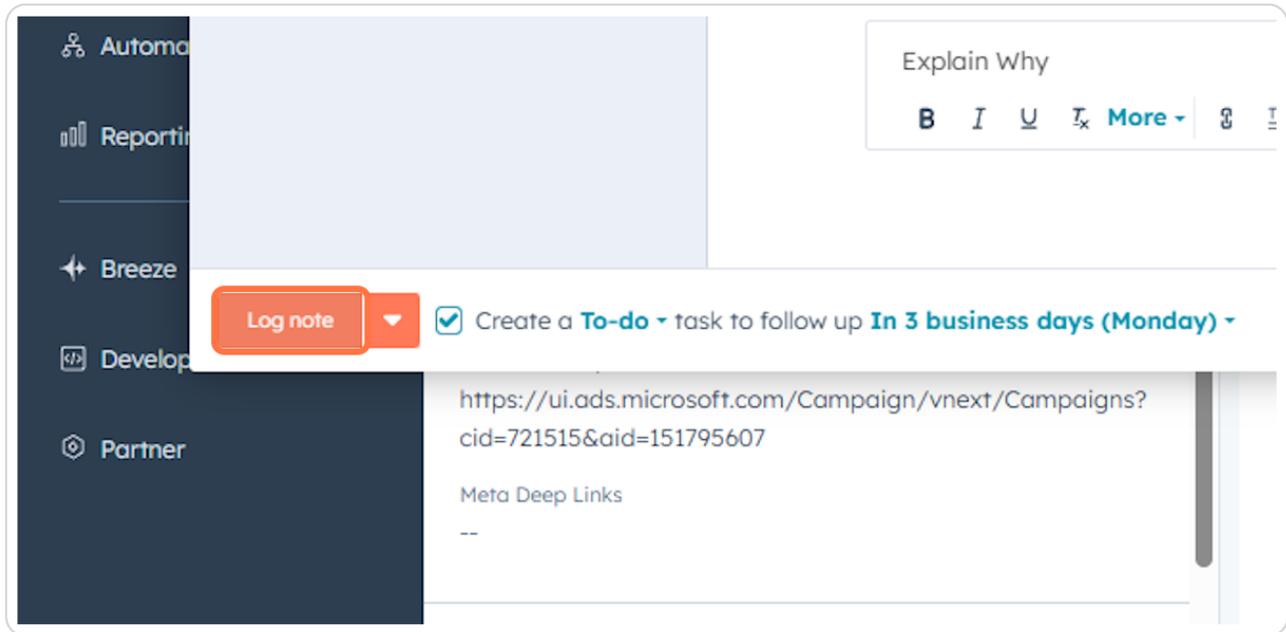
Notes

Response is required for this question

Notes - Last 90 Days

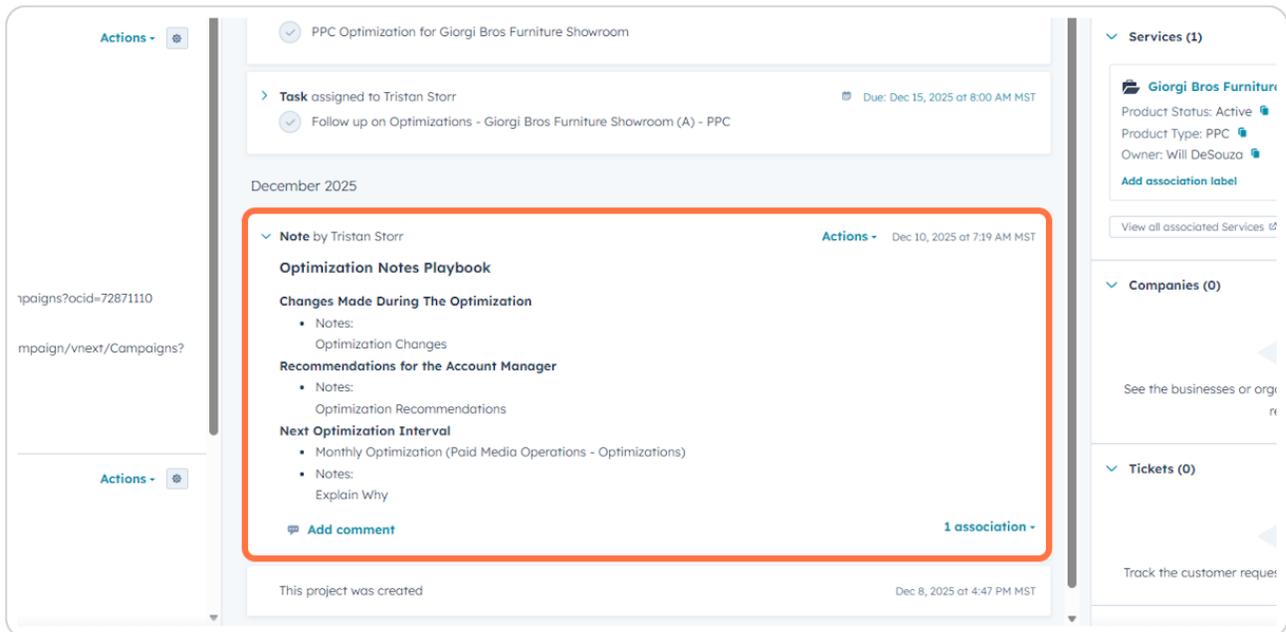
STEP 11

When the playbook is complete, select "Log Note"



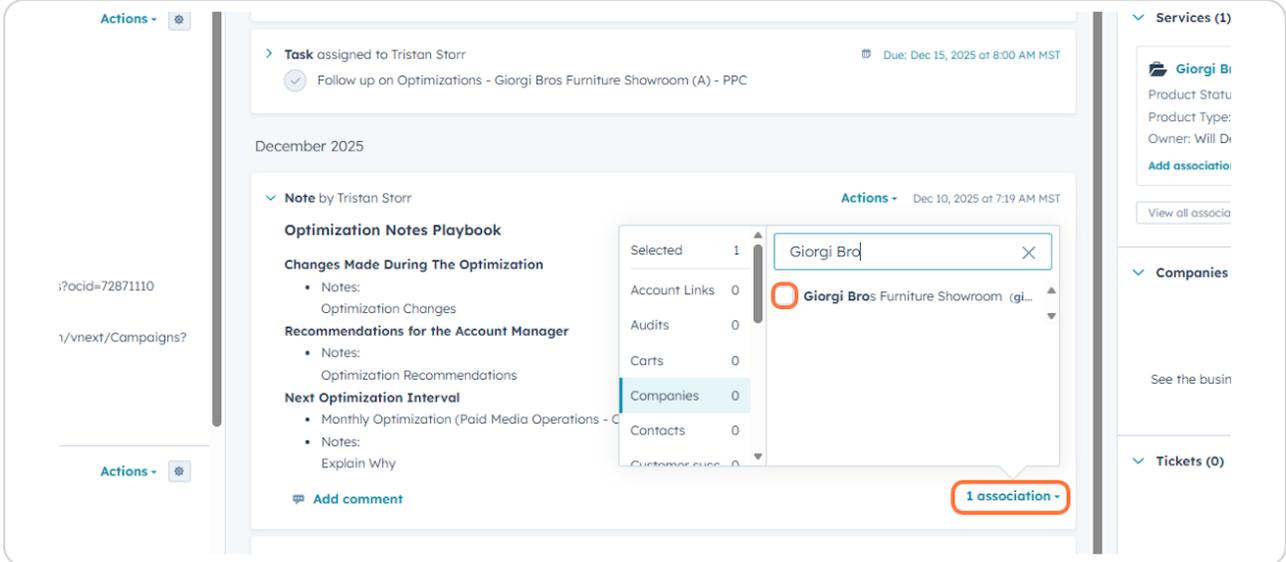
STEP 12

The playbook note will now appear in the Activity feed of the Project record, autoformatted for readability.



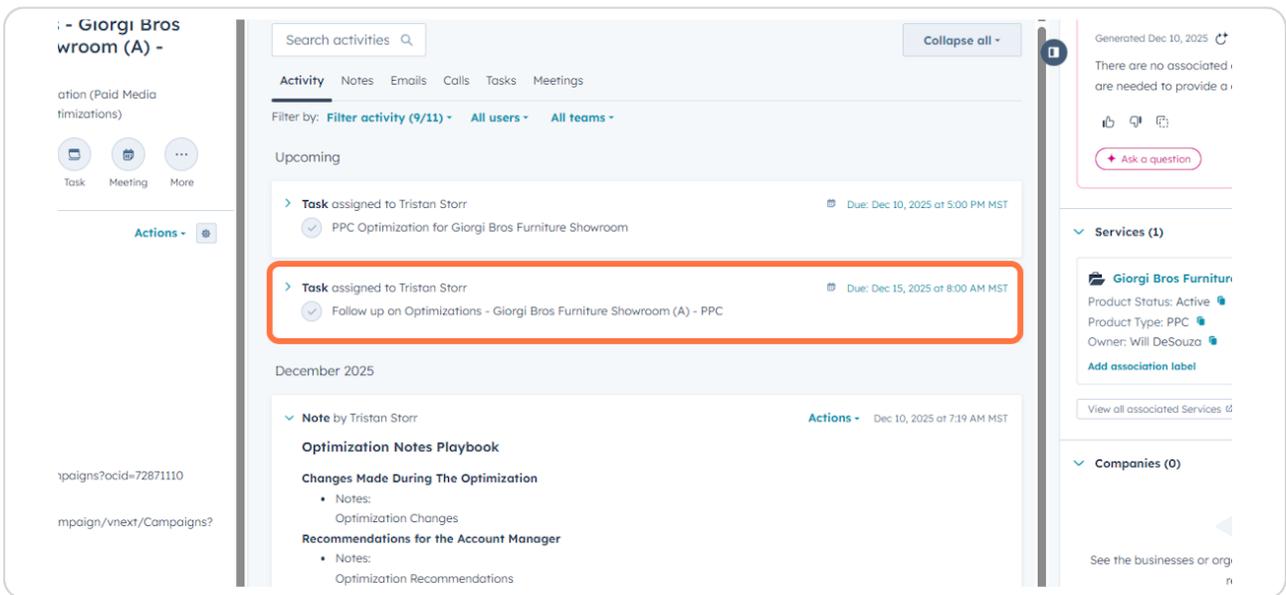
STEP 13

If you wish to make the note visible from other HubSpot records, you can choose to associate it from the associations menu in the bottom right of the Note Activity Card. In this example, we are making the note visible from the Company record.



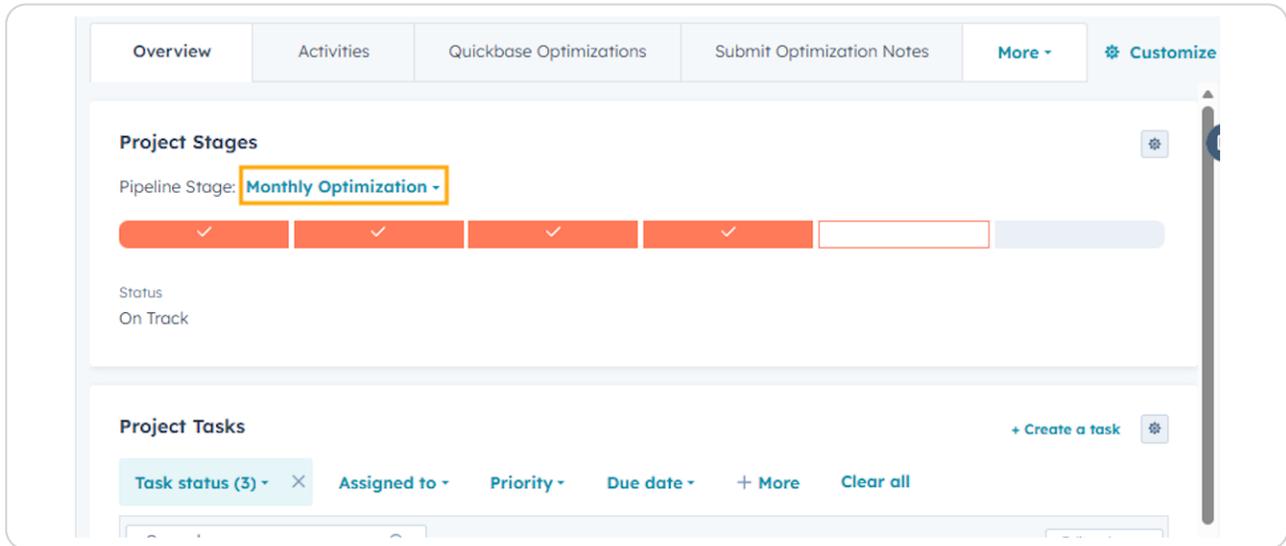
STEP 14

Additionally, the follow up task we generated was created and assigned to me as the creator.



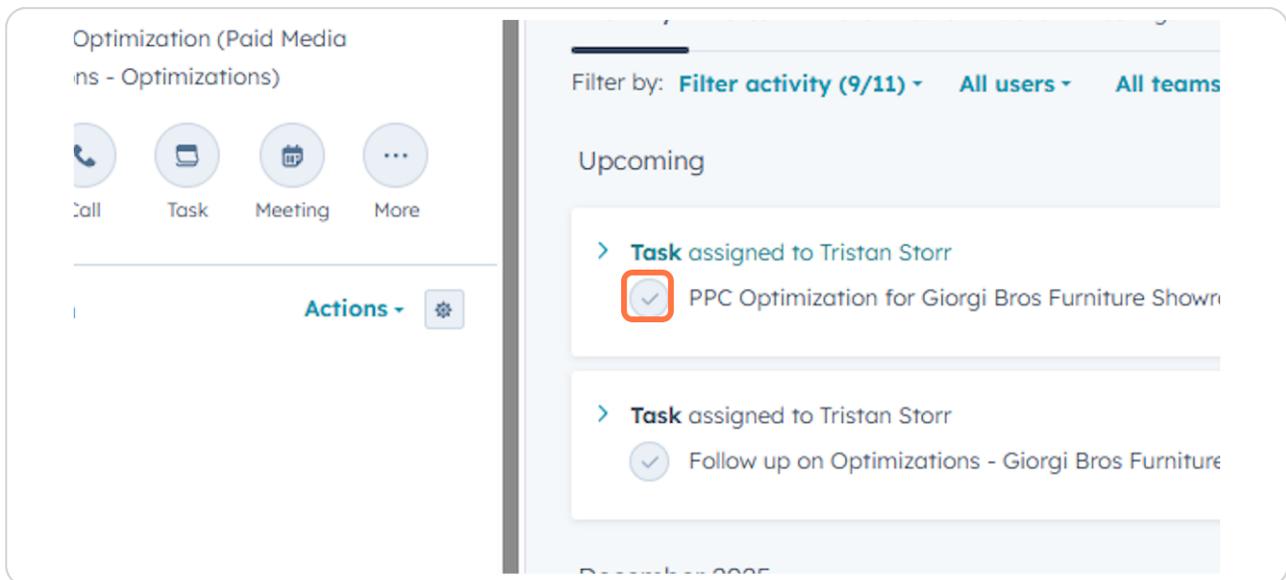
STEP 15

Once you have completed your optimization, use the "Project Stage" card to determine op cadence. You can select Daily, Bi-Daily, Weekly, Bi-Weekly, or Monthly. For many established accounts, keeping the same cadence requires no action.



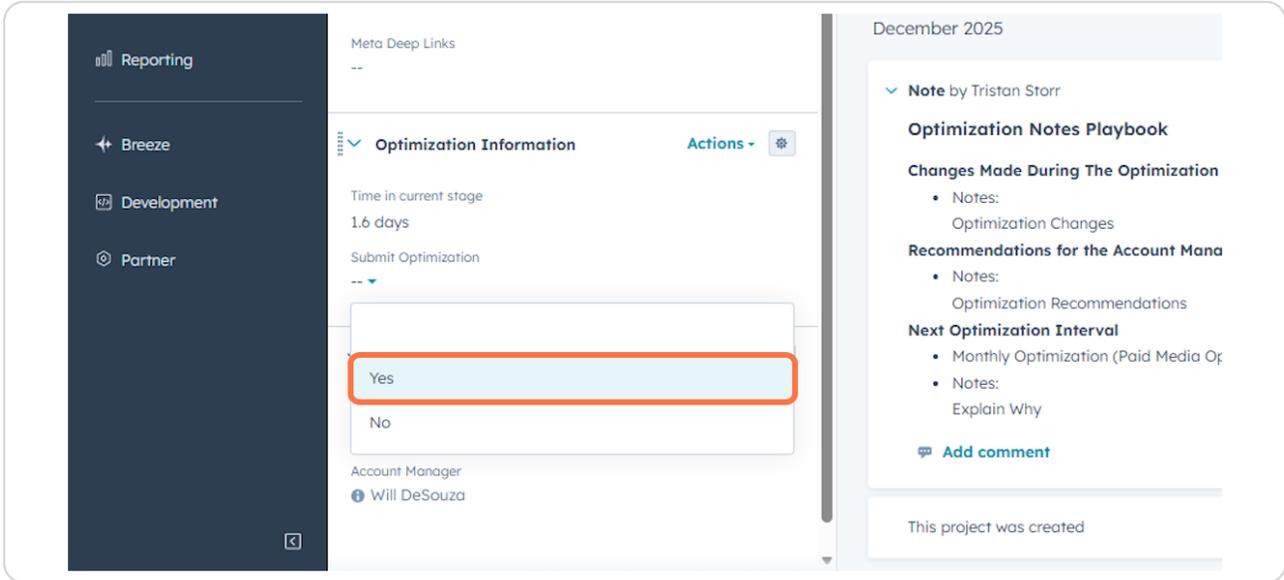
STEP 16

Once you are ready to complete this optimization, mark the Task as completed. This action will prompt the system to reschedule a new optimization task at your selected cadence. (See Below for Details)



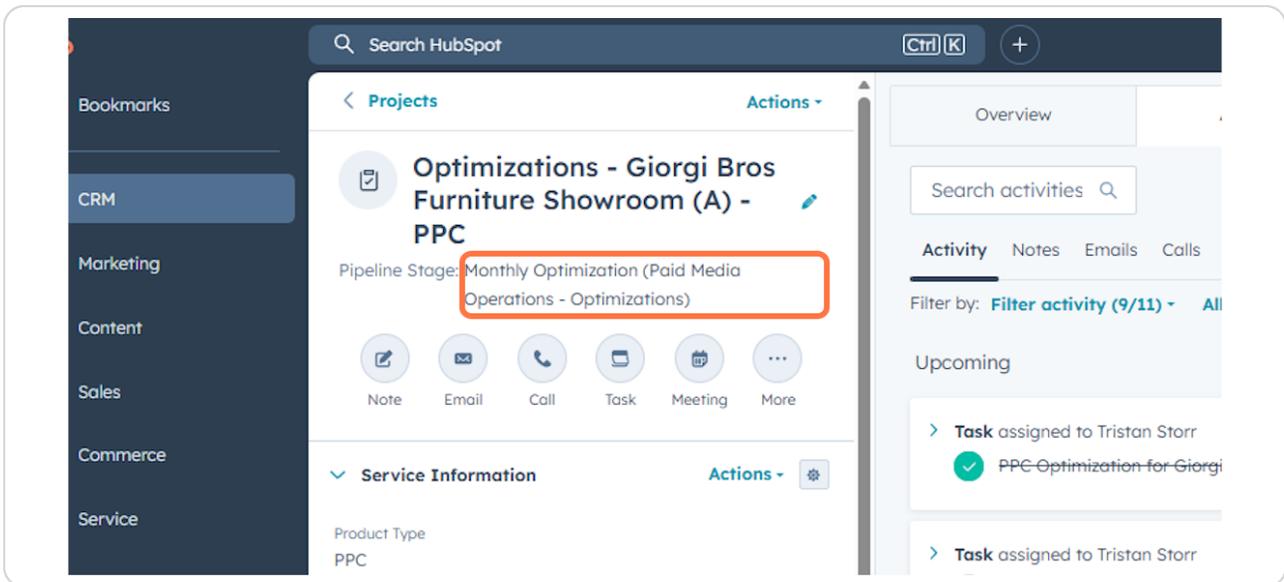
STEP 17

FOR YOUR FIRST OPTIMIZATION: To ensure that each project gets enrolled in the Optimization Cycle workflow, manually move the Submit Optimization property to Yes and this will act as the trigger for enrollment. This is a one-time action for your first optimization on a project.



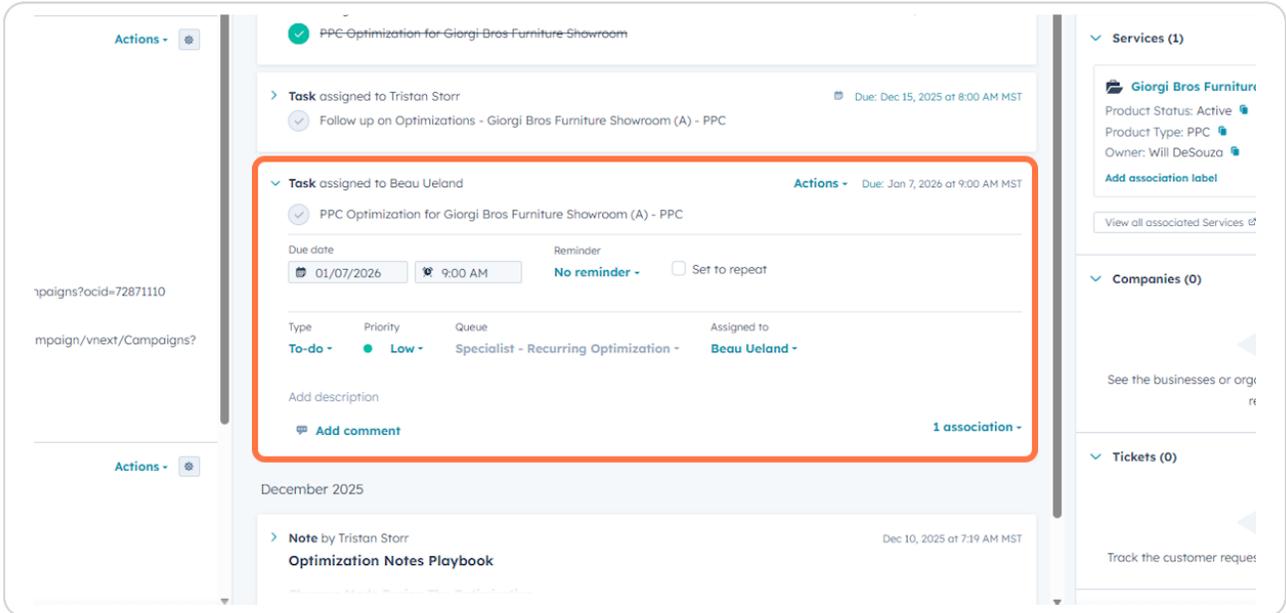
STEP 18

Because we are in the Monthly Optimization stage, the new task will be generated for 20 business days (28 total days) from today.



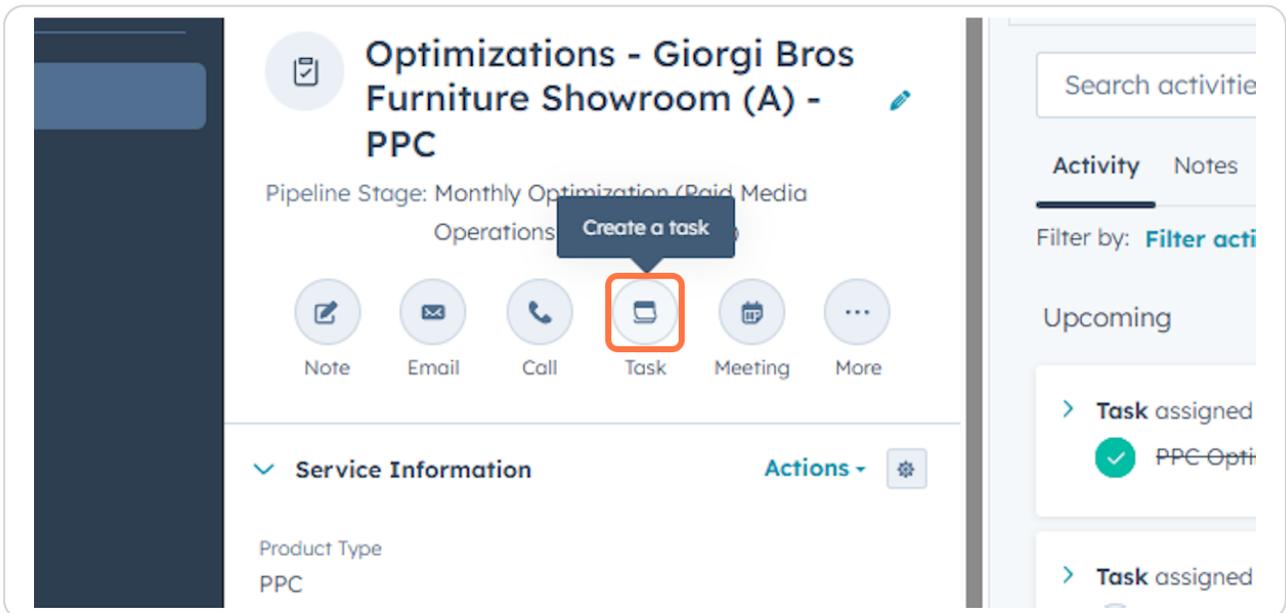
STEP 19

The new task will appear in the Activity feed and will show in your Dashboard queues as the due date approaches.



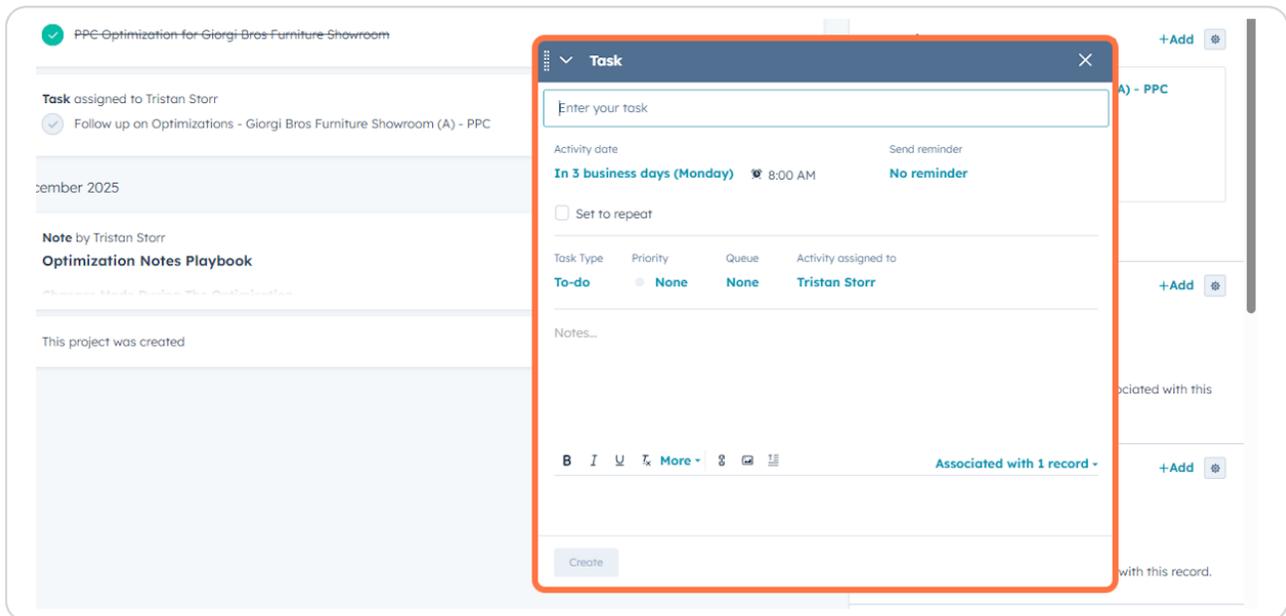
STEP 20

If you wish to create additional follow-up tasks or check-ins, you can manually create tasks from the Activity Bar in the top left of the project record.



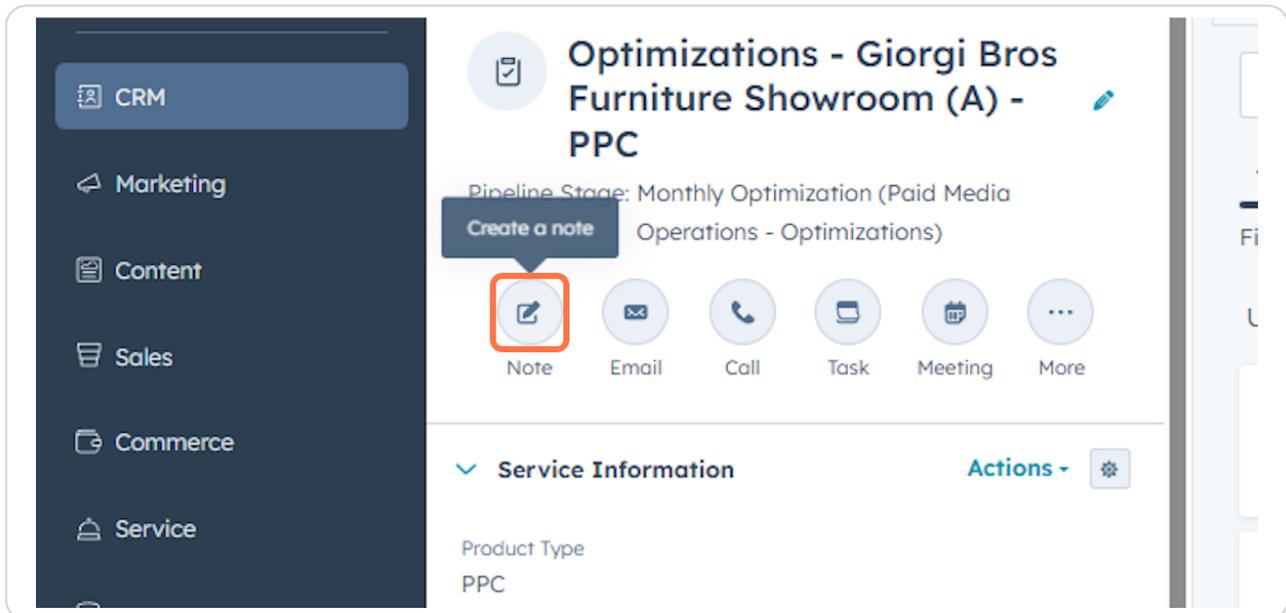
STEP 21

This will open up a task creation interface which you can fill out.



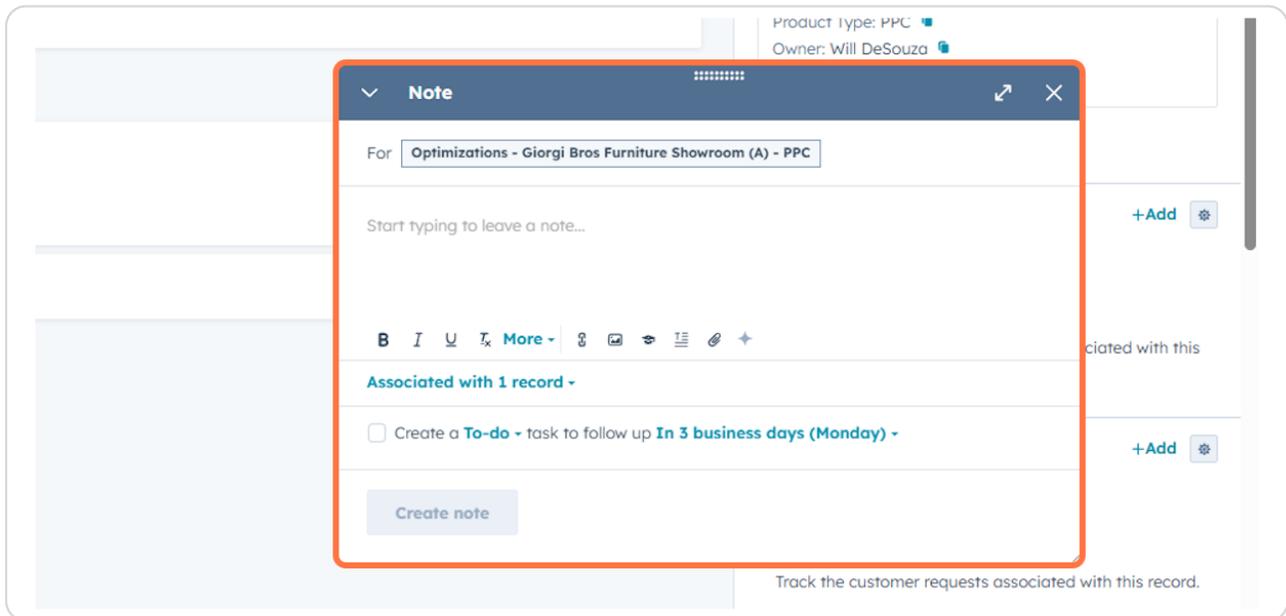
STEP 22

Similarly, if you wish to add any notes to the activity record independently of the playbook, you can do so by selecting the "Note" button from the Activity Bar.



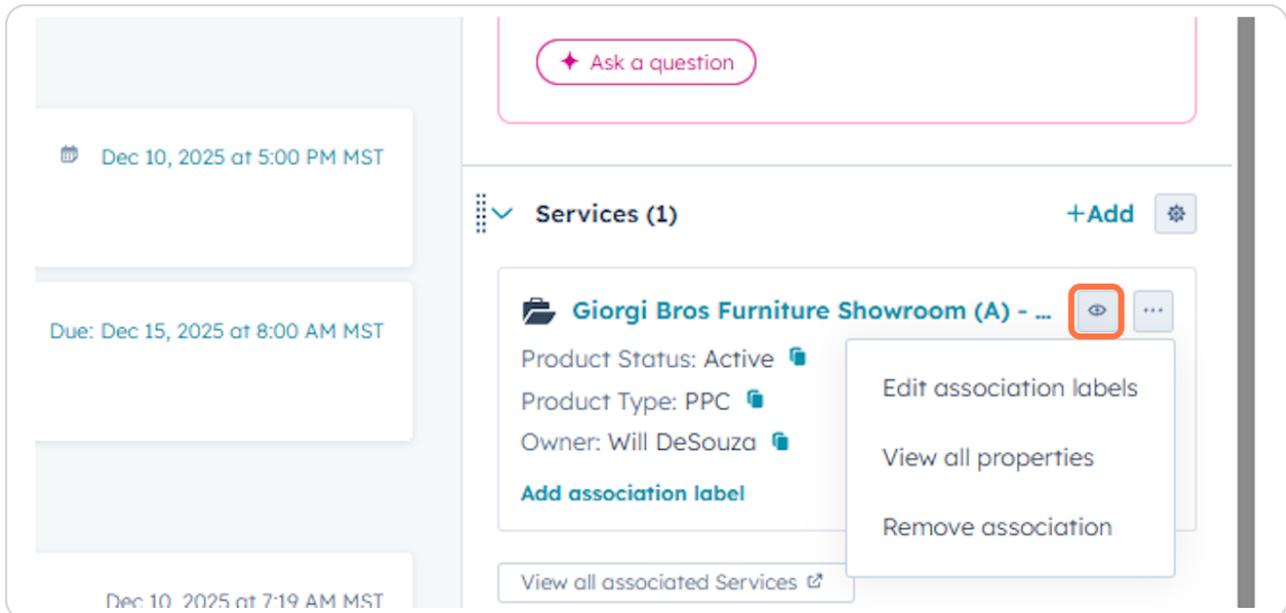
STEP 23

This will open up a note creation interface which you can fill out.



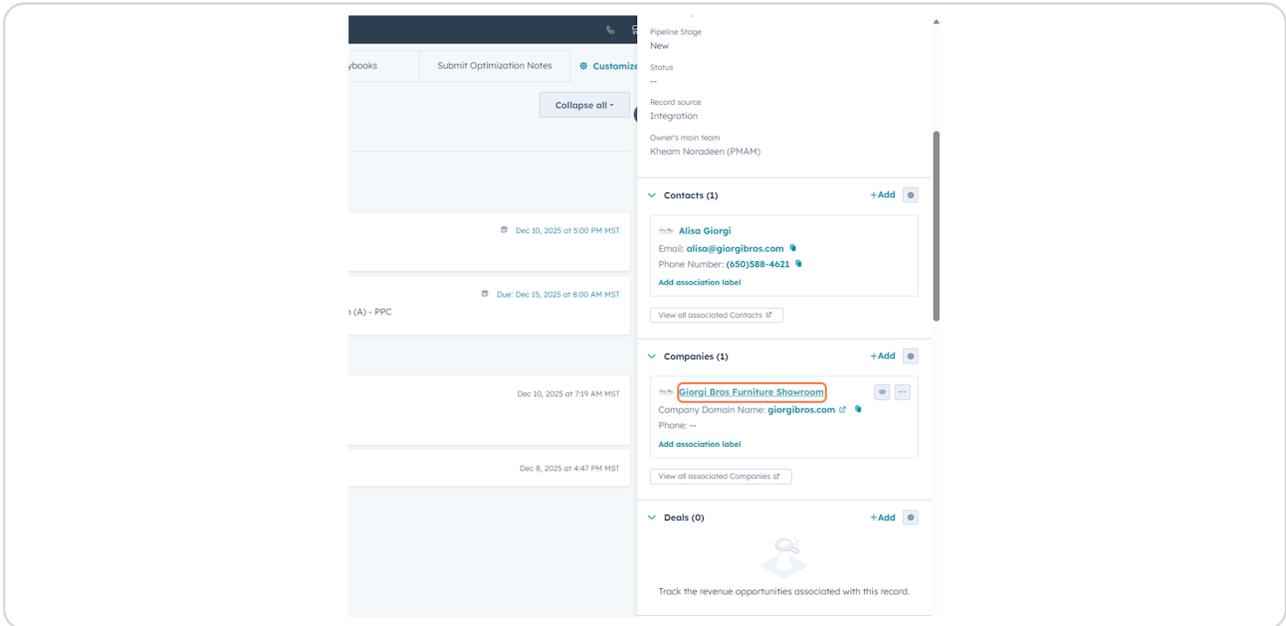
STEP 24

If you wish to navigate to the Service record related to the Project, you can do so by selecting the Service title in the Service card. If you wish to navigate to the Company record, select the eye icon on the card.



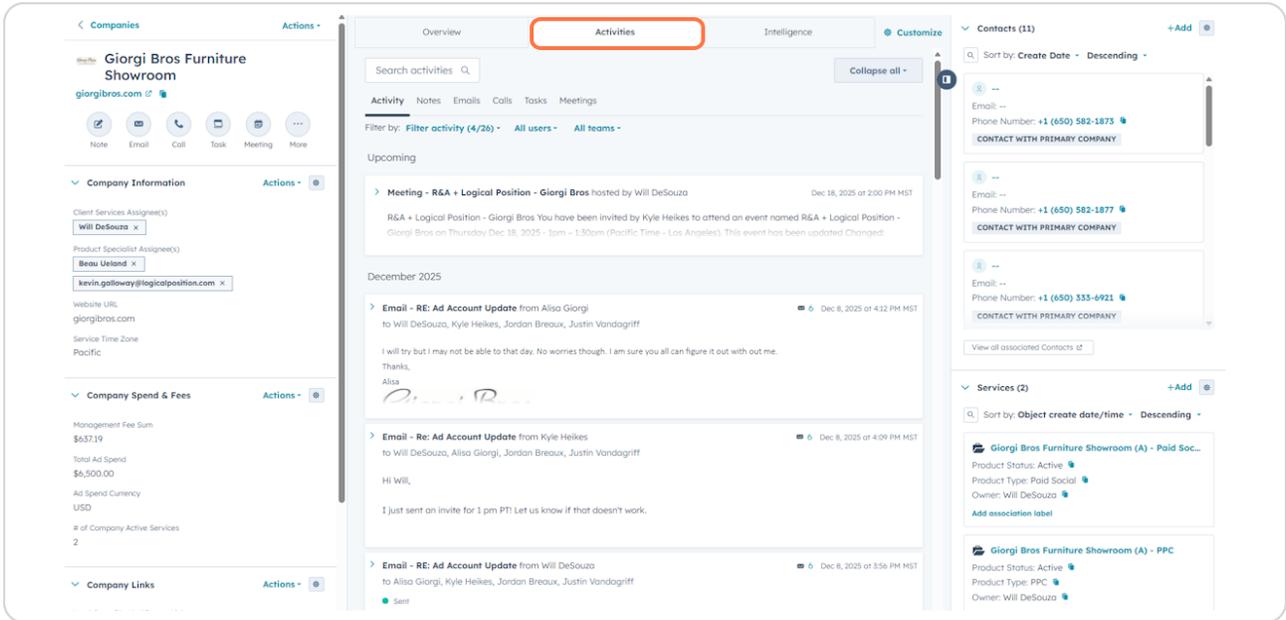
STEP 25

This will open a record preview from the right side. Scroll down to the Companies card and select the Company title.



STEP 26

On the Company record, you can review the Activity feed to see Calls, Meeting, and Emails between the Client & Account Manager.



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