

Creative Refresh Workflow Handoffs

Handoffs Between Parties

Purpose: This document details the **handoffs** between the Client, Account Manager, SAS, and Creative Team throughout the Creative Refresh process. Each handoff is defined by what triggers it, what the sending party does to complete it, and what the receiving party gets as a result.

1. Parties and Responsibilities

Four parties participate in every Creative Refresh. Understanding each party's scope is the foundation for understanding the handoffs between them.

Party	Responsibilities in the Creative Refresh
Client	<ul style="list-style-type: none">• Provides new assets and direction for the refresh. Gives final approval on deliverables before implementation.
Account Manager (AM)	<ul style="list-style-type: none">• Kicks off the refresh by reaching out to the client.• Facilitates new assets and requirements to the SAS.• Facilitates client approval and feedback on completed deliverables.• Marks the refresh as approved and ready for implementation.
SAS	<ul style="list-style-type: none">• Creates deliverable tickets based on assets and requirements gathered by the AM.• Responds to creative team questions during the deliverable creation process.• Implements approved creatives in Meta once the client has signed off.
Creative Team (Copywriter and Designer)	<ul style="list-style-type: none">• Builds the actual deliverables once submitted by the SAS.• Works copy and graphics independently, has each QA'd by the team lead, then moves Tickets to pending approval.• Fulfills any client revisions until final approval is achieved.

2. The Handoff Mechanism: Creative Refresh Status

The Creative Refresh Status field on the creative project is the central tool used to hand off work from one party to another. Moving this field forward is how each party signals "my part is done; the next party can take over."

Most handoffs operate one of two ways:

- **Status-driven handoff:** Moving the status field forward is a notation that work has been completed. In some cases this also triggers tasks and email notifications to the next party.
- **Artifact-driven handoff:** The creation of deliverable tickets, or a ticket reaching pending approval, is itself the handoff. Tickets appearing in a queue are what signals the next party that work exists.

Creative Refresh Status Values in Order

#	Status Value	What It Means
1	(blank)	Default state. The process has not yet been kicked off, or it has just reset after a prior cycle completed.
2	No Refresh Requested	Client declined the refresh this cycle. AM sets this; it short-circuits the process and reschedules the refresh date.
3	Refresh Request Submitted	AM has had the conversation with the client and logged any new assets or requirements as a note on the creative project. Waiting on the creative refresh date to arrive.
4	Deliverable Submitted	SAS has created the deliverable tickets. Creative team now has work in its queue in the form of Tickets and Tasks.
5	Creatives Pending Approval	All deliverable tickets in the Ad Set have hit Pending Approval. This is the most important handoff. AM is notified to share Ad Lab Link with client for approval.
6	Creatives Completed and Approved	Client has approved all deliverables. AM moves status here to hand off to SAS for implementation.
7	Creatives Implemented	SAS has implemented the creatives in Meta. This triggers the refresh date to reschedule and the status to reset to blank.

Important

Moving the status to Creatives Implemented is what signals the system to reschedule the Creative Refresh Date based on the configured cadence (typically 90 days) and to reset the status field to blank. Without this move, the cycle will not reset.

3. The Handoffs, Step by Step

Each handoff below follows the same structure:

- The trigger that initiates it
- The actions of the sending party
- The artifact or status change that constitutes the handoff itself
- What the receiving party gets

Handoff 1: Automation → Account Manager

Kickoff of the Refresh Cycle

Trigger: Creative Refresh Date is 15 days or fewer away (two full weeks of lead time).

Sending Party: The Creative Refresh automation

Receiving Party: Account Manager.

What the AM Receives:

- A task on the creative record (also associated to the company) to reach out to the client.
- An email notification telling the AM to start the conversation.

AM's Required Actions Before the Next Handoff:

- Contact the client. Remind them their package entitles them to a creative refresh every 90 / 60 / 30 days (or whatever applies).
- Ask whether they want a refresh, and if so, whether they want to use existing assets or provide new ones.
- If new assets or requirements are provided, document them in a note activity on the creative project. The creative project should serve as the log of all client-provided assets and AM/client conversations.
- Complete the assigned tasks on the creative record.

Handoff 2a: Account Manager → System (No Refresh Path)

Client declines the refresh

Trigger: Client tells the AM they do not want a refresh this cycle.

Handoff Mechanism: AM moves Creative Refresh Status to No Refresh Requested.

What Happens:

- Process terminates for this cycle. SAS receives no tasks. Creative team receives no tickets.
- System reschedules the Creative Refresh Date for the next cycle based on the configured cadence.

Handoff 2b: Account Manager → SAS

Refresh request and new assets/requirements

Trigger: Client confirms they want a refresh; AM has documented any new assets and requirements.

Sending Party: Account Manager

Receiving Party: SAS

AM's Required Actions:

- Document new assets and requirements as a note activity on the creative project. This serves as the SAS's source of truth for the upcoming submission.
- Move the Creative Refresh Status to Refresh Request Submitted.

What this status change does (and does not) do

Moving to Refresh Request Submitted does NOT trigger automation. The SAS does not get a task or email at this point. This status change is a notation on the record that the conversation occurred and that everything the SAS needs is now logged on the project. The actual hand-off to the SAS happens at the next trigger.

Handoff 3: Automation → SAS

Refresh date arrives; SAS is cued to submit tickets

Trigger: Creative Refresh Date equals today.

Sending Party: Creative Refresh automation

Receiving Party: SAS

What the SAS Receives:

- A task indicating the creative refresh is ready for submission.
- An email notification with the same message.

SAS's Required Actions Before the Next Handoff:

- Open the creative project and review the note activities logged by the AM.
- Add deliverable tickets in the deliverable ticket section of the project, one per deliverable required by the package.
- Mark the assigned task as complete.
- Move the Creative Refresh Status to Deliverable Submitted.

Turnaround time depends on ticket count

If 4 or fewer deliverable tickets are created, standard turnaround times apply. If 5 or more, the ad set has slightly longer turnaround times overall.

Handoff 4: SAS → Creative Team

Deliverable tickets become the creative team's queue

Trigger: SAS creates the deliverable tickets

Sending Party: SAS.

Receiving Party: Creative Team (Copywriter and Designer)

Handoff Mechanism:

The creation of the deliverable tickets themselves is the handoff. The Deliverable Submitted status that follows is just notation. The creative team knows work exists because new tickets and tasks appear in their queue.

Creative Team's Workflow Per Ticket:

- Copywriter and Designer work independently on the same ticket.
- Copywriter writes copy, logs it on the deliverable ticket, prompts team lead for QA, resolves any feedback via comments, and moves their portion to Copy Approved.
- Designer works on graphics in parallel, gets graphics approved by their team lead, fulfills any feedback, and moves to the approved state on graphics.
- Once both copy and graphics are approved on a ticket, that ticket's status moves to Pending Approval.

Handoff 5: Creative Team → Account Manager

The most important handoff in the process

Trigger: ALL deliverable tickets sharing the same Deliverable Folder Name reach Pending Approval status.

Sending Party: Creative Team

Receiving Party: Account Manager (with SAS notified)

Why folder name matters

An ad set is bound together by the Deliverable Folder Name. All tickets sharing the same folder name must reach Pending Approval before any handoff fires. A single ticket reaching Pending Approval is NOT enough to trigger this handoff (unless the Ad Set contains only one deliverable).

What Happens Automatically:

- An email notification is sent to the SAS letting them know the ad set is complete.
- An email notification is sent to the AM letting them know the ad set is ready for review.
- Creative Refresh Status moves forward to Creatives Pending Approval.
- The AM receives a task: Share Deliverables with Client.

Creative Team's Required Action:

- Take the AdLab link where the creatives live and paste it into the Most Recent AdLab Link field on the project.

AM's Required Action:

- Pull the Most Recent AdLab Link and share it with the client via email, asking for review and feedback.

Handoff 6 (Conditional Revisions): Account Manager → Creative Team

Revision loop when client requests changes

Trigger: Client provides feedback that requires revisions on one or more deliverables

Sending Party: Account Manager

Receiving Party: Creative Team

AM's Required Actions:

- On each deliverable ticket that needs revisions, indicate whether the revision is to copy, graphics, or both.
- Document the feedback as a note activity on the ticket. Either write out the feedback explicitly, share what the client said over email, or instruct the creative team to check AdLab for the feedback.

What Happens Automatically:

- The affected ticket(s) move back to In Progress.
- A new task and notification are sent to the creative team for the affected ticket(s).

Creative Team's Required Actions:

- Make the requested changes.
- Move the ticket(s) back to Pending Approval.

The revision loop repeats

When all tickets in the folder hit Pending Approval again, Handoff 5 fires again: the AM is notified and shares with the client. The cycle continues until the client approves with no further changes.

Handoff 7: Account Manager → SAS

Client approves; SAS is cleared to implement

Trigger: Client gives final approval with no further revisions.

Sending Party: Account Manager

Receiving Party: SAS

AM's Required Action:

- Move the Creative Refresh Status forward from Creatives Pending Approval to Creatives Completed and Approved.

What the SAS Receives:

- An email notification that the creatives have been approved and need to be implemented.
- A task: Implement New Creatives for Refresh.

SAS's Required Actions:

- Go into the creative project and the individual tickets that were submitted (or pull finished deliverables directly from AdLab).
- Implement the creatives in Meta as soon as possible.

Handoff 8: SAS → System (Cycle Close)

SAS closes the loop and resets the cycle

Trigger: SAS finishes implementing the creatives.

Sending Party: SAS

Receiving Party: Creative Refresh automation (which will then notify the AM).

SAS's Required Action (one of two paths):

- Path A (preferred): Mark the Implement New Creatives for Refresh task as complete. This automatically moves the Creative Refresh Status to Creatives Implemented.
- Path B (manual fallback): Manually move the Creative Refresh Status from Creatives Completed and Approved to Creatives Implemented.

Why both paths exist

Some team members have missed task completion dependencies in the past. Either path achieves the same outcome. The bottom line is that the status must reach Creatives Implemented in some form, or the refresh date will not reschedule.

What the System Does Automatically:

- Recalculates the Creative Refresh Date based on the configured cadence (e.g., 90 days from today).
- Overwrites the Creative Refresh Status field as blank, so the entire process can kick off fresh on the next cycle.
- Sends an email notification to the AM letting them know the new creatives have been implemented and that they should reach out to the client to confirm.

Handoff 9: System → Account Manager (Confirmation)

Closes the cycle on the AM side

Trigger: Status moved to Creatives Implemented.

What the AM Receives: An email notification stating the new creatives are live.

AM's Required Action: Reach out to the client and confirm the new creatives are up and running. No status change is required from the AM at this step.

4. Handoff Quick-Reference Matrix

Use this matrix as a quick lookup for who hands off to whom at each step.

#	Trigger	From	To	Mechanism	Status After
1	Refresh date ≤ 15 days	System	AM	Task + email to AM	(blank)
2a	Client declines	AM	System	Status change	No Refresh Requested
2b	Client confirms refresh	AM	SAS	Note activity + status change (notation only)	Refresh Request Submitted
3	Refresh date = today	System	SAS	Task + email to SAS	Refresh Request Submitted
4	SAS creates tickets	SAS	Creative Team	Deliverable tickets created (tickets ARE the handoff)	Deliverable Submitted
5	All tickets in folder hit Pending Approval	Creative Team	AM (SAS notified)	Auto status change + emails + task to AM + AdLab link	Creatives Pending Approval
6	Client requests revisions	AM	Creative Team	Ticket-level revision flags + note + auto task	Creatives Pending Approval
7	Client approves	AM	SAS	Status change → task + email to SAS	Creatives Completed and Approved
8	Implementation complete	SAS	System	Task complete OR manual status change	Creatives Implemented → (blank)
9	Status = Creatives Implemented	System	AM	Email notification to AM	(blank — cycle reset)

5. Key Principles to Remember

- **The status field is the spine of the process.** Forgetting to move it forward stalls the handoff even if work is technically done.

- **Not every status change triggers automation.** Refresh Request Submitted and Deliverable Submitted are notation only. The real handoffs at those points are the note activity and the ticket creation, respectively.
- **Folder name binds an ad set together.** The Creatives Pending Approval handoff only fires when ALL tickets sharing a folder name reach Pending Approval.
- **The creative project is the conversation log.** All client-provided assets, requirements, and conversation notes belong here as note activities so the SAS, creative team, and future AMs have a single source of truth.
- **Reaching Creatives Implemented is mandatory to reset the cycle.** Whether achieved by completing the implementation task or moving the status manually, the cycle will not reschedule without it.