

Creative Refresh

End-to-End User Guide

How the Paid Social Creative Refresh process runs in HubSpot — from the 14-day kickoff through implementation and reset. Covers responsibilities for Account Managers, Social Ad Specialists, the Creative Team, and Team Leads.

Audience: Account Managers, Social Ad Specialists, Copywriters, Graphic Designers, Team Leads

System of record: HubSpot (Creative Portfolio project + Creative Deliverables ticket pipeline)

Contents

1. *Overview*
2. *How the system is organized*
3. *The five phases of Creative Refreshes*
4. *Who does what (role summary)*
5. *Phase 1 — Kickoff (Day -14 through the refresh date)*
6. *Phase 2 — Deliverable setup*
7. *Phase 3 — Fulfillment and internal QA*
8. *Phase 4 — Client approval and revisions*
9. *Phase 5 — Implementation and cycle reset*
10. *On-demand deliverables (outside the refresh cycle)*
11. *Creative Refresh Status — reference table*
12. *Handoff quick-reference matrix*
13. *Key rules and best practices*
14. *Glossary*

1. Overview

The Creative Refresh is the recurring process by which clients on Paid Social subscriptions receive new ad creatives on a defined cadence, typically every 90 days. The process runs in HubSpot and coordinates four parties: the Client, the Account Manager (AM), the Social Ad Specialist (SAS), and the Creative Team (Copywriter and Graphic Designer), with Team Leads providing internal QA.

This guide walks through the full lifecycle: how the refresh is triggered automatically, how the AM collects requirements from the client, how the SAS submits deliverable tickets, how the Creative Team builds and QAs each piece, how client approval and revisions are handled, and how implementation closes the cycle and reschedules the next one.

The same fulfillment process is used for on-demand deliverables created outside the refresh cycle (for example, during onboarding). That variation is covered in section 10.

2. How the system is organized

HubSpot organizes client work in a hierarchy. Understanding it makes the rest of this guide easier to follow.

- **Company** — the top-level client record.
- **Service** — nests under the Company. Represents an individual client subscription (the equivalent of a Quickbase order).
- **Project** — nests under the Service. For paid social clients, the relevant project type is the *Creative Portfolio*, which is the permanent home for all creative activity related to that subscription.
- **Ticket** — how individual units of work are tracked. Each creative deliverable lives as its own ticket on the Creative Deliverables pipeline.

Two fields drive nearly all of the automation in this process: **Creative Refresh Status** on the Creative Portfolio, and **Deliverable Folder Name** on each ticket. Both are covered in detail later in this guide.

3. The Five Phases of The Creative Refresh Process

Phase	Name	What happens
1	Kickoff	Automation prompts the AM 15 days out. AM contacts the client, captures direction or declines the refresh, and hands off to the SAS.
2	Deliverable Setup	On the refresh date, the SAS creates one ticket per deliverable on the Creative Deliverables pipeline. Tasks auto-fire to the Copywriter and Designer.
3	Fulfillment & Internal QA	Copy and graphics are built in parallel, submitted on the ticket, and reviewed by the respective Team

Phase	Name	What happens
		Leads. Tickets advance to Pending Approval once both are approved.
4	Client Approval	Once all tickets in the Ad Set are Pending Approval, the AM is prompted to share the Ad Lab link. Revisions loop back to Copy, Design, or both until the client signs off.
5	Implementation & Reset	AM moves status to Creatives Completed & Approved; SAS implements in Meta and marks the task complete. The system reschedules the next Creative Refresh Date and resets the status.

4. Who Does What?

Each phase has clear owners. Use this section to orient before diving into the step-by-step instructions.

Account Manager (AM)

Owns the client relationship across the cycle.

- Confirms whether the client wants a refresh and logs any new assets or direction as a Note on the Creative Portfolio.
- Moves Creative Refresh Status forward at the two manual gates: Refresh Request Submitted and Creatives Completed & Approved.
- Shares the Ad Lab link with the client once the Ad Set reaches Pending Approval, and routes feedback or approval back into HubSpot.
- Confirms with the client after implementation that the new creatives are live.

Social Advertising Specialist (SAS)

Bridges the AM's requirements to the Creative Team and implements approved work in Meta.

- Reviews the AM's Note on the Creative Portfolio and creates one Creative Deliverable ticket per deliverable in the Ad Set.
- Responds to questions from the Creative Team during fulfillment.
- Implements approved creatives in Meta once the AM moves the status to Creatives Completed & Approved, then marks the implementation task complete to close the cycle.

Copywriter

- Writes copy outside of HubSpot, then documents the final copy as a Note on the deliverable ticket.
- Moves Ad Copy Approval to Submitted to trigger Team Lead QA. After QA approval or after client revision, the ticket advances toward Pending Approval.

Graphic Designer

- Builds graphics outside of HubSpot and uploads them via Note on the deliverable ticket.
- Moves Graphic Design Approval to Submitted to trigger Team Lead QA.
- Updates the Most Recent Ad Lab Link property on the Creative Portfolio once all creatives in the Ad Set are uploaded. This is the link the AM shares with the client.

Copywriter Team Lead / Design Team Lead

- Receive an auto-assigned QA task each time their team member moves an approval field to Submitted.
- Leave feedback using the Comment feature on the relevant Note, or move the approval field to Approved if the work is ready.

5. Phase 1 — Kickoff

The refresh begins automatically. The AM does not need to remember when refreshes are due since the system surfaces them at the right time.

5.1 Automation prompts the AM (14 days out)

When the Creative Refresh Date is 15 days away, HubSpot does three things automatically:

- Sends the AM an email notification about the upcoming refresh.
- Creates a Discuss Creative Refresh task on the Creative Portfolio, due within 2 business days, assigned to the AM.
- Surfaces the client's SAS in the email so the AM knows who they will be handing off to.

5.2 AM contacts the client

The AM reaches out to the client and confirms two things:

- Whether they want a refresh this cycle
- If so, whether they have new assets or creative direction to provide.

5.3 If the client declines

The AM moves Creative Refresh Status to **No Refresh Requested**. This bypasses all downstream workflows and reschedules the next refresh date based on the configured Creative Refresh Cadence (typically 90 days). **No tasks are sent to the SAS or Creative Team.**

5.4 If the client wants a refresh

The AM logs all client direction and assets as a Note on the Creative Portfolio. Best practices:

- Tag the SAS in the Note (@mention) so they get visibility.
- Upload any client-provided assets directly to the Note using the paperclip icon.
- Be specific about brand voice, campaign themes, or anything else the SAS and Creative Team will need.

Once the Note is saved, the AM moves Creative Refresh Status to **Refresh Request Submitted**. This is a notation and does not trigger automation. The actual handoff to the SAS fires when the Creative Refresh Date arrives.

Note

If preferred, the AM can also submit a Back Office Request ticket to the SAS with the attached assets. Either method is acceptable. The important thing is that the SAS receives the assets and direction with enough lead time before the refresh date.

5.5 Refresh date arrives — automation hands off to the SAS

When the Creative Refresh Date equals today, the system:

- Creates a Create Paid Social Deliverables for Refresh task for the SAS on the Creative Portfolio.
- Sends the SAS an email notification with the same prompt.

6. Phase 2 — Deliverable setup

The SAS reads the AM's Note, then creates one ticket per deliverable in the Ad Set. The trick is that one ticket is built from scratch and the rest are cloned from it.

6.1 Review the AM's Note

Open the Creative Portfolio and read the most recent Note activity from the AM. It should contain the client's direction and any assets they provided. If anything is unclear, follow up with the AM before creating tickets.

6.2 Create the first ticket

1. On the Creative Portfolio, scroll to the Tickets card in the right sidebar and click + Add.
2. Give the ticket a placeholder name (HubSpot will rename it automatically based on the folder name and ad type).
3. Select Creative Deliverables as the Pipeline. This surfaces the Dependent Properties box with all the fields needed for a deliverable.

6.3 Fill out the Dependent Properties

The following fields are required or commonly used:

- **Creative Refresh?** — Yes for refresh-driven deliverables. No for new build deliverables.
- **Deliverable Folder Name** — The single most important field from an automation standpoint since it is what links every ticket in the Ad Set together. Set it once on the first ticket and **never change it** on subsequent tickets for the same Ad Set.
- **Number of Deliverables In This Ad Set** — tells the system how large the Ad Set will be.
- **Type of Ad** — Static Image, Simple Animation, GIF Graphic Design, etc.
- **Responsible Team Members** — Copywriter, Graphic Designer, or both, depending on the deliverable.
- **Requested Date of Completion** — the internal deadline for this deliverable.
- **Priority** — Low, Medium, High, or Urgent.
- **Ad Draft Name, CTA Button, Number of Ad Copy Variations, Funnel Position, Ad Placement** — complete as applicable.

Click Create. HubSpot will auto-rename the ticket using the Folder Name and ad type.

Critical

Deliverable Folder Name and Number of Deliverables In This Ad Set must be identical across every ticket in the same Ad Set. Changing either on a cloned ticket will break the automation that fires when the Ad Set is complete.

6.4 Clone the ticket for the rest of the Ad Set

Rather than building each ticket from scratch, clone the first one:

1. **Open the ticket and choose Actions > Clone.**
2. HubSpot will prompt you to modify the ticket before finishing. Update Type of Ad and any other fields that differ. Leave Deliverable Folder Name and Number of Deliverables untouched.
3. Click Clone.
4. Repeat for each remaining deliverable in the Ad Set.

Turnaround tip

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.

6.5 Move status forward

Mark the SAS task on the Creative Project as complete, then move Creative Refresh Status to **Deliverables Submitted**. This status is a notation — the real handoff to the Creative Team is the existence of the new tickets and the auto-assigned Copy and Design tasks.

7. Phase 3 — Fulfillment and internal QA

Each deliverable ticket carries two parallel tracks: copy and graphics. They progress independently and only converge when both have been approved by the respective Creative Team Leads.

7.1 Either user moves the ticket to In-Progress

When work begins, either the Copywriter or the Graphic Designer updates the Ticket Status to In-Progress. Actual writing and design happen in the team's existing tools — the ticket is for tracking and communication.

7.2 Copywriter track

1. Draft copy outside of HubSpot.
2. Return to the ticket and create a Note containing the finished copy.
3. Mark the assigned Copy task as complete.
4. Move **Ad Copy Approval** to Submitted. This auto-generates a QA task for the Copywriter Team Lead.

The Copywriter Team Lead reviews using the Comment feature on the copy Note:

- If changes are needed, the Team Lead leaves comments. The Copywriter revises, re-documents the final copy on the Note, and moves Ad Copy Approval back to Submitted. The cycle repeats.
- If the copy is ready, the Team Lead moves Ad Copy Approval to Approved and completes their QA task.

7.3 Graphic Designer track

The same pattern applies to graphics:

1. Build the design outside of HubSpot.
2. Create a Note on the deliverable ticket and upload the graphic assets using the paperclip attachment.
3. Mark the assigned Design task as complete.
4. Move **Graphic Design Approval** to Submitted. This auto-generates a QA task for the Design Team Lead.

The Design Team Lead reviews using the Comment feature on the graphics Note:

- If changes are needed, the Designer revises and re-submits. Cycle repeats until approved.
- If graphics are ready, the Team Lead moves Graphic Design Approval to Approved and completes their QA task.

7.4 Ticket auto-advances to Pending Approval

Once both Ad Copy Approval and Graphic Design Approval are Approved on the same ticket, the Ticket Status moves itself to Pending Approval. The ticket owner gets an email notification that the deliverable is complete.

7.5 Designer posts the Ad Lab link

When all creatives in the Ad Set have been uploaded, the Graphic Designer updates the **Most Recent Ad Lab Link** property on the Creative Portfolio. This is where the AM expects to find the link to share with the client.

7.6 Ad Set completes

When *every* ticket sharing the same Deliverable Folder Name reaches Pending Approval, the system fires the most important handoff in the process:

- Creative Refresh Status auto-advances to Creatives Pending Approval.
- Email notification sent to the AM that the Ad Set is ready for client review.
- Email notification sent to the SAS confirming the Ad Set is complete.
- A Share Drafted Deliverables With Client task is assigned to the AM.

Why this matters

A single ticket reaching Pending Approval is *not enough* to fire this handoff. The Deliverable Folder Name binds the Ad Set together so all tickets sharing that folder must reach Pending Approval before the AM is notified. This is why Folder Name must never be changed after the first ticket is created.

8. Phase 4 — Client approval and revisions

8.1 AM shares the Ad Lab link

Pull the Most Recent Ad Lab Link from the Creative Portfolio and share it with the client via email, asking for review and feedback. The task on the Creative Portfolio prompts the AM with the same instruction.

8.2 Client approves one or more deliverables

For each approved deliverable, the AM moves the corresponding Ticket Status to **Completed Deliverable**.

8.3 Client requests changes — revision loop

If the client wants changes on a deliverable, the AM:

1. Navigates to the specific deliverable ticket.
2. Adds a Note documenting the client's feedback. Either paste the feedback verbatim, forward the client's email, or note that the feedback lives in Ad Lab .
3. Sets the **Needs Revisions** field to the appropriate value: Copy & Graphic Revisions, Copy Revisions Only, or Graphic Revisions Only.

Setting Needs Revisions does several things automatically:

- Ticket Status moves back to In-Progress.
- The applicable Approval field(s) reset to Not Submitted.
- A new task fires to the Copywriter and/or Designer.

8.4 Revisions are completed (QA is bypassed)

For revisions, the Copywriter and Designer can move their Approval field directly to Approved once changes are implemented. A second pass through the Team Lead is not required. Best practice is still to document the changes made via a Note activity.

When all elements of the ticket are Approved again, Ticket Status returns to Pending Approval. When all tickets in the Folder are back to Pending Approval, the same *Folder Test Name Ad Set Is Ready for Client Approval* email is re-sent to the AM. The cycle continues until the client signs off with no further changes.

8.5 Final sign-off

Once the client has approved every deliverable, the AM moves Creative Refresh Status to **Creatives Completed & Approved**. This is a manual step that only the AM can take — only they know when the client is fully done with feedback.

9. Phase 5 — Implementation and cycle reset

9.1 SAS implements

Moving the status to Creatives Completed & Approved fires:

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

The SAS pulls the approved assets from the deliverable tickets (or directly from Ad Lab) and implements them in Meta as soon as possible.

9.2 Close the loop

Once implementation is done, the SAS has two equivalent paths to close the cycle:

- **Preferred:** Mark the Implement New Creatives for Refresh task as complete. This auto-advances Creative Refresh Status to Creatives Implemented.
- **Fallback:** Manually move Creative Refresh Status from Creatives Completed & Approved to Creatives Implemented.

Either path achieves the same outcome. The status must reach Creatives Implemented one way or the other, or the next refresh will not be rescheduled.

The SAS should also move each individual Deliverable Ticket Status to Completed Deliverable if it isn't already.

9.3 System reset

Once status hits Creatives Implemented, the system:

- Recalculates the next Creative Refresh Date based on the Creative Refresh Cadence (e.g., 90 days from today).
- Clears the Creative Refresh Status field so the cycle can start fresh.
- Sends the AM an email notification that the new creatives are live.

9.4 AM confirms with the client

On receiving the confirmation email, the AM reaches out to the client to confirm the new creatives are running. No status change is required from the AM for this step — it's purely a relationship touch.

10. On-Demand Deliverables (outside the refresh cycle)

New deliverables are sometimes needed outside of the regular refresh cadence — for example, during onboarding, when a client requests an ad hoc deliverable, or when the AM submits a one-off Back Office Request. The fulfillment process is the same; only the kickoff differs.

How it differs from a refresh

- There is no 14-day automation trigger or Discuss Creative Refresh task. The SAS starts the process manually.
- The SAS may not need to move the Creative Refresh Status at all — that field governs the recurring cycle, not one-off work.
- Everything else — ticket creation, Folder Name discipline, fulfillment, internal QA, client approval, revisions, implementation — works exactly as described in sections 6 through 9.

Key reminder: even for on-demand deliverables, Deliverable Folder Name must be set consistently across every ticket in the Ad Set. The system still fires the Pending Approval handoff to the AM based on Folder Name.

11. Creative Refresh Status — reference

The Creative Refresh Status field on the Creative Portfolio is the spine of the process. This table summarizes every value, what it means, and who moves the status into it.

Status	What it means	Who moves it
(blank)	Default state. Process has not yet kicked off, or it just reset after a completed cycle.	System
No Refresh Requested	Client declined the refresh this cycle. Short-circuits the process and reschedules the next refresh date.	AM
Refresh Request Submitted	AM has spoken with the client and logged new assets / direction as a Note on the Creative Portfolio. Waiting for the Creative Refresh Date to arrive.	AM
Deliverables Submitted	SAS has created the deliverable tickets. Creative Team's queue now contains the new tickets and tasks.	SAS
Creatives Pending Approval	All deliverable tickets in the Ad Set have hit Pending Approval. AM is notified to share Ad Lab link with the client.	System (auto)

Status	What it means	Who moves it
Creatives Completed & Approved	Client has approved all deliverables with no further revisions. AM signals to SAS to begin implementation.	AM
Creatives Implemented	SAS has pushed the creatives live in Meta. System reschedules the next Creative Refresh Date and resets the status.	SAS (or auto on task complete)

12. Handoff quick-reference matrix

Use this matrix as a fast lookup for who hands off to whom at each step in the cycle.

#	Trigger	From	To	Mechanism	Status after
1	Refresh date is 14 days away	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	Ticket creation IS the handoff; tasks auto-fire	Deliverables Submitted
5	All tickets in folder hit Pending Approval	Creative Team	AM (SAS notified)	Auto status change + emails + AM task with Ad Lab link	Creatives Pending Approval
6	Client requests revisions	AM	Creative Team	Needs Revisions field + note; auto task	Creatives Pending Approval
7	Client approves	AM	SAS	Status change → task + email to SAS	Creatives Completed & Approved
8	Implementation complete	SAS	System	Task complete OR manual status change	Creatives Implemented → (blank)
9	Status = Creatives Implemented	System	AM	Email to AM	(blank — cycle reset)

13. Key rules and best practices

Deliverable Folder Name is critical

The Folder Name is what binds an Ad Set together. The Creatives Pending Approval handoff only fires when every ticket sharing the same Folder Name reaches Pending Approval. Set it once on the first ticket and never modify it on cloned tickets. Number of Deliverables In This Ad Set must also remain consistent across the set.

Creative Refresh Status is the spine

Forgetting to move the status forward at one of the manual gates stalls the entire process, even if work is technically done. The AM has two manual gates: Refresh Request Submitted (to signal kickoff) and Creatives Completed & Approved (to release implementation). The SAS has one: Creatives Implemented (or, equivalently, completing the implementation task).

Not every status change triggers automation

Refresh Request Submitted and Deliverables Submitted are notation only. The real handoffs at those points are the AM's Note activity and the SAS's ticket creation, respectively. Status changes elsewhere in the process do fire automation.

The Creative Portfolio is the conversation log

All client-provided assets, requirements, and notes belong on the Creative Portfolio as Note activities. Per-deliverable feedback (from the Team Lead or the AM relaying client feedback) belongs on the individual ticket as a Note with Comments. This keeps a clear, auditable history and means a future AM or SAS can reconstruct the cycle without digging through email or Teams.

For revisions, internal QA is not repeated

Once a client revision request comes in, the Copywriter and Designer can move their Approval fields directly to Approved without re-engaging the Team Lead. This is intentional — it expedites turnarounds. Documenting the change made via a Note is still best practice.

Reaching Creatives Implemented is mandatory

The next refresh date will not be recalculated until Creative Refresh Status reaches Creatives Implemented. The SAS can either complete the implementation task (which advances the status automatically) or move the status manually. Either path works, but the cycle will not reset without it.

14. Glossary

Term	Definition
Ad Lab	The internal tool where finished creatives are uploaded for review. The link the AM shares with the client lives in the Most Recent Ad Lab Link property on the Creative Portfolio.
Ad Set	A group of deliverable tickets that share the same Deliverable Folder Name. The Ad Set is the unit on which client approval is requested.
Creative Portfolio	The HubSpot project record for a paid social client's subscription. Permanent home for all creative activity, including refresh-cycle notes and deliverable tickets.
Creative Refresh	The recurring process by which a paid social client receives new creatives on a defined cadence, typically every 90 days.
Creative Refresh Cadence	Property on the Creative Portfolio that defines how often refreshes occur (e.g., 90 days). Drives the Creative Refresh Date recalculation.
Creative Refresh Date	The target date on which a new round of creatives is due. Automation fires 14 days before this date and on the date itself.
Creative Refresh Status	Field on the Creative Portfolio that tracks where in the cycle the refresh currently is. See section 11 for all values.
Deliverable Folder Name	Field on each deliverable ticket that links all tickets in an Ad Set. Must be identical across every ticket in the set.
Needs Revisions	AM-controlled field on a deliverable ticket. Setting it to Copy Revisions Only, Graphic Revisions Only, or Copy & Graphic Revisions reopens the ticket and routes feedback.
Pending Approval	Ticket Status reached automatically once both Ad Copy Approval and Graphic Design Approval are Approved.
Service	HubSpot object nested under Company. Represents an individual client subscription.