LOGICAL POSITION • CREATIVE REFRESH PROCESS

Deliverable Ticket Management

A user guide for Copywriters and Graphic Designers in HubSpot

About this guide

This guide is written for Copywriters and Graphic Designers on the Paid Social team. It explains what to do when a Deliverable Ticket lands in your queue, where to find your work in HubSpot and how to track it, Ticket anatomy, QA handoffs, and how Client revisions are facilitated back to you.

It specifically covers the portion of the Creative Refresh process that lives between the Social Ad Specialist (SAS) submitting tickets and the Account Manager (AM) sharing the final assets with the client. If you want broader context on how the full refresh cycle works, see the end-to-end Creative Refresh User Guide.

Contents

1. The two places to look for your work

Almost everything you do in this process lives in two HubSpot objects:

- **Tickets Ovject** — your primary home base. A ticket is one Deliverable. It holds the full picture: which project it belongs to, what status it is in, who is responsible, the deliverable folder name, ad type, requested completion date, and all the strategic context the SAS submitted.
- **Tasks Object** — a lighter view of individual to-dos. A task only tells you that there is something to do on a ticket — it does not give you the surrounding information.

Most of the time, you should be working out of Tickets. Tasks are best used when quickly checking what is overdue and marking things complete as you go. The recommendation across the team is to make Tickets your default starting point each day.

> **Recommended habit**
> Set Tickets as your HubSpot homepage in your user settings, and pin the two views described below as tabs at the top of your interface. Once that is set up, your daily flow becomes: open HubSpot, glance at My Open Deliverable Tickets, work the list down.

2. Finding your work — the Tickets object

How to get there

1. In the left-hand HubSpot navigation bar, hover over the address book icon to open the CRM menu.
2. Scroll down to Tickets (it sits between Deals and Orders).
3. HubSpot will open an Index View — basically a table report of ticket records. From here you can switch between views using the tabs across the top.

Index Views to use

There are several views configured for Creative Deliverable tickets. As an individual contributor, two of them matter to you. The others are mostly for Team Leads and department leadership monitoring workload.

My Open Deliverable Tickets — your main queue

This is the view you will live in. It shows every Deliverable Ticket where you are listed as a responsible team member (either Copywriter or Graphic Designer) and the ticket is not closed.

A few things to know about how it filters:

- If a ticket needs both copy and design and you are the assigned Copywriter, it shows here — and it also shows for the assigned Designer.
- If a ticket is *graphic-only* on a project where you are the Copywriter, it will **not** show in your queue, because no copy work is required.
- Same logic the other direction: a *copy-only* ticket on a project where you are the Designer will not appear in your queue.

Columns you will see at a glance include the related Project, current Ticket Status, Deliverable Folder Name, responsible team members, ad type, create date, requested date of completion, and who submitted the ticket. Click any column header to sort — most people sort by Requested Date of Completion or Create Date.

> **The goal**
> The point of this view is to drive your queue down to as close to empty as it can get. It will never be totally empty because new work is always coming in, but anything sitting here is a ticket you can still move forward on.

My Deliverables Awaiting Approval

This view shows tickets where your part of the work is complete and the ticket has advanced to Pending Approval — meaning it is sitting with the Account Manager waiting for the client. There is nothing you need to do on these tickets unless they come back for revisions.

Think of the two views together like this:

- **My Open Deliverable Tickets** — work you need to move forward.
- **My Deliverables Awaiting Approval** — work that is parked with the AM and the client. You can monitor it, but you cannot do anything to it until and unless it comes back.

Department-wide views

You will also see views like All Open Deliverables and similar broader filters. These are primarily for team leads and department leadership to assess workload across the team. You are welcome to use them, but they are not where you should be managing your own day-to-day work.

Customizing your own views

Index Views are flexible. If you find that you like My Open Deliverable Tickets but want different columns, a different sort, or an additional filter:

1. Open the view you want to start from.
2. Adjust the columns and filters to your preferences.
3. Use the Save As option to save it as a new view for yourself.
4. Set that as your default view if you want it to load every time.

Talk to your team lead if there is information you wish your view surfaced — it is often easy to add. You are encouraged to design a homepage that works for you.

3. Finding your work — the Tasks object

Tasks live alongside Tickets but show only the to-do itself, without the surrounding project context. They are best used as a quick checklist.

How to get there

1. From the same CRM menu (address book icon, left navigation), scroll past Meetings.
2. Select Tasks.
3. By default you will land on a view that lists tasks assigned to you.

The view to use — All Tasks

Use the All Tasks view. It surfaces every incomplete task assigned to you, sorted by due date so the most urgent items are at the top. The reason this view works well for you is straightforward: the only tasks you will be assigned are the ones generated by automation (one per ticket for your respective discipline) or any subtasks you create for yourself. There is no benefit to filtering further — you just need to see what is open.

How tasks behave

- Each new Deliverable Ticket automatically generates a Complete Ad Copy task for the assigned Copywriter, and a Complete Graphic Design task for the assigned Designer when that party is selected as a Responsible Team Member during Deliverable creation.
- Overdue tasks do not disappear from views or records. They stay in the view with the due date highlighted in **red**. That makes it easy to spot work that has slipped.
- Clicking a task takes you straight to the related ticket, so you can complete the work in context.
- You can mark a task complete from inside the task itself or from the related ticket's Activities tab.

> **Where to spend most of your time**
> Tasks are a useful safety net, but Tickets are richer and show the bigger picture. Default to Tickets, and dip into Tasks when you want a tighter focus on what is due.

4. Anatomy of a Deliverable Ticket

When you open a ticket, the layout should be consistent. Knowing where to find each piece of information will save you a lot of clicking.

Ticket name and basic header

As soon as a ticket is submitted, automation renames it to a standardized naming convention based on the deliverable. You do not need to manage the name and should not edit it unless specifically directed to do so

Naming Convention: *[Creative Portfolio Name] – [Type of Ad] – [Due Date]*

Central column — the Creative Deliverables tab

This is where you will do most of your information gathering and status updates. The central column contains a few key cards:

- **Creative Deliverable Tracker** — Status bar. This is where you will find Ticket Status, Ad Copy Approval, Graphic Design Approval, and the Needs Revisions field. You move the ticket forward by changing values in this card.
- **Deliverable Information** — Specifics about an individual deliverable. Includes ad placements, funnel position, number of ad copy variations, objective, top-performing copy and design (if any), landing page URLs, and a link to any assets the client provided.
- **Evergreen Creative Information** — Context that applies across Ad Sets over time. This includes brand guidelines, target audience, top sellers, shipping notes, and strategic reasoning.
- **Ad Set Deliverables** — The other tickets in the same Ad Set (i.e., the tickets that share this ticket's Deliverable Folder Name). Most refreshes will have three tickets per Ad Set; some have more.

Right column — Associations

On the right side you will see:

- **Project** — the parent Creative Portfolio for this client. Click through if you need to see broader context, the AdLab link field, or other related records.
- **Tickets** — the same Ad Set ticket list shown in the central column, but in a more compact form.
- **Company / Attachments** — any attached assets and the related Company record.

Activities tab

Switch to the Activities tab from the central column to see every Note and Task on the ticket. Use the filter at the top to narrow to Notes only or Tasks only. This is the fastest way to find your assigned task to mark it complete, or to find a recent Note from the Team Lead or AM.

Notes vs. Tasks — what each is for

Two activity types matter to you:

- **Tasks** are *input* activities. They mean 'something needs to be done.' Your default Copy or Design task is created automatically when the ticket is submitted. You can also create your own subtasks (for example, 'finalize CTA wording') by clicking the Task button at the top left of the ticket and filling out the form. Use these as reminders to yourself; you are not expected to create them just to have them.
- **Notes** are *output* activities. They are how you record what was done. Your final ad copy and final graphic design are submitted as a Note on the ticket. You can either write the copy directly into the note, attach assets/files via the paperclip icon, or paste links to assets and/or copy stored externally (Canva, Google Docs, Box, AdLab, etc.). The Note becomes the artifact your Team Lead reviews and comments on.

Tip — use Notes to tell the story
Beyond the final-submission Note, you can leave intermediate Notes as you work to capture decisions, flag questions for the AM or SAS, or share rough drafts. This is optional, but it helps anyone picking up the ticket later understand how it got where it is.

5. Working a ticket from start to finish

Here is the end-to-end shape of your work on a single ticket. Each step is expanded below.

#	Step	What happens
1	Ticket lands in your queue	SAS submits the ticket; HubSpot assigns you and creates a task.
2	First-touch status move	First person to open the ticket moves Ticket Status from New Deliverable to In Progress.
3	Review the ticket	Review the Deliverable Information and Evergreen Creative Information cards to understand the scope of the request. Note related tickets in the Ad Set.
4	Do the work outside HubSpot	Write copy or build graphics in your normal tools.
5	Log the final output as a Note	Add a Note to the ticket with the finished copy or graphic. Content can be either embedded directly in the note, attached, or linked.
6	Complete your task	Mark the automated Complete Ad Copy or Complete Graphic Design task(s) complete as necessary.
7	Submit for Team Lead QA	Move Ad Copy Approval or Graphic Design Approval from Not Submitted to Submitted. Team Lead QA tasks will be generated.
8	Address Team Lead feedback	Resolve any Team Lead comments on your Note; Repeat QA cycle until the Team Lead marks Approved.
9	Ticket auto-advances	When both Approval fields are Approved, Ticket Status moves to Pending Approval automatically.
10	Handle revisions if needed	If the AM flags Needs Revisions, ticket returns to In Progress with a new task. Revise and resubmit.
11	Repeat for all tickets in an Ad Set	Repeat the ticket fulfillment process described above for all tickets in an Ad Set.

Step 1 — Ticket lands in your queue

Three things happen at submission:

- The ticket is renamed to the standardized naming convention.
- You are assigned as the Copywriter or Graphic Designer. That assignment is *inherited* from the Copywriter and Graphic Designer values on the parent Creative Portfolio.

- The Deliverable Folder Name is set. This is the identifying value that ties every ticket in the Ad Set together. **Do not change it at any point during fulfillment.**

> **Important — never edit the Deliverable Folder Name**
> All tickets in the same Ad Set share an identical Deliverable Folder Name. Changing it on one ticket would break the Ad Set grouping and the downstream automation that fires when the final ticket in the set is complete.

Step 2 — First-touch status move

Whoever opens the ticket first (Copywriter or Designer) should move Ticket Status from **New Deliverable** to **In Progress**. This is purely organizational and it does not fire any automation. If the status is already In Progress when you open it, no action is required.

Step 3 — Review the ticket

Before you start writing or designing, take a couple of minutes on the ticket. The information you need is laid out in the central column:

- Deliverable Information — the specifics for this one deliverable.
- Evergreen Creative Information — brand guidelines, audience, top sellers, etc.
- Ad Set Deliverables — the other tickets in this Ad Set. Glance at these so you understand what the full set looks like.
- Any Notes the SAS or AM left — these often contain strategic context that did not fit into a structured field.

Step 4 — Do the work outside HubSpot

Write copy and build graphics in your usual platforms (Google Docs, Word, Canva, Adobe, etc.) HubSpot is not where production happens, simply where it gets tracked.

If you want to leave running Notes on the ticket as you work to capture decisions, questions, or drafts you can by using Note activities.

Step 5 — Log the final output as a Note

Once your draft is ready for QA, return to the ticket and create a Note activity. You have flexibility in how you do this:

- **Paste the copy directly into the Note** — works well for short ad copy.
- **Attach the graphic file(s)** — use the paperclip icon to upload PNGs, JPGs, MP4s, etc.
- **Paste a link** — drop a Canva, Box, Google Doc, or AdLab link into the Note body. Tag your Team Lead in the Note so they get notified directly.

Whatever the format, the Note must contain, or clearly point to, the final copy or final graphic for this ticket. This Note becomes the artifact the Team Lead reviews and comments on for QA.

Step 6 — Complete your task

Find your assigned **Complete Ad Copy** or **Complete Graphic Design** task on the Activities tab and mark it complete. If you created subtasks for yourself along the way, clean those up at the same time.

Step 7 — Submit for Team Lead QA

In the Creative Deliverable Tracker card, change your respective approval field:

- **Copywriters** — move **Ad Copy Approval** to **Submitted**.
- **Graphic Designers** — move **Graphic Design Approval** to **Submitted**.

This move is what triggers the QA task for your Team Lead. They will be notified, open the ticket, and review the Note you created.

> **Copy-only or graphic-only tickets**
> On these tickets, only one of the two approval fields is in play. The other will be set to *Not Applicable* and you can ignore it. The ticket will advance based on the single field that applies.

Step 8 — Address Team Lead feedback

Your Team Lead has two paths:

- **Changes needed** — they use the **Comment** feature directly on the Note you created. You will be notified of the comment. Make the revisions, update the Note (or add a new Note with the revised version), and use the Mention feature (@ icon) to tag your TL for review. The cycle repeats until the Team Lead is satisfied.
- **Approved** — they move your Approval field to **Approved** themselves and complete their QA task.

Step 9 — Ticket auto-advances to Pending Approval

Once **both** Ad Copy Approval and Graphic Design Approval are Approved (or one is Approved and the other is Not Applicable), automation moves **Ticket Status** forward to **Pending Approval** on its own. You do not need to push it.

At this point the ticket leaves your active queue and shows up in My Deliverables Awaiting Approval. The next handoff is to the Account Manager.

6. Submitting your work for Team Lead QA

This step deserves its own section because it is where most of the back-and-forth happens. The mechanics are simple, but the discipline matters.

The QA loop

The flow is the same regardless of whether you are submitting copy or graphics:

1. You finish a draft.
2. You add a Note containing the final draft (or a link to it). Tag your Team Lead if you want a direct ping.
3. You complete your assigned task.
4. You move your Approval field to Submitted.
5. Team Lead reviews the Note. They either approve or leave comments.
6. If comments — you revise, update the Note, and use the mention feature in comments (@) to tag your Team Lead to re-review your deliverables.
7. If approved — Team Lead moves your respective Approval field to Approved themselves.

How feedback is delivered

All Team Lead feedback during QA happens through **comments on your Note**. This is intentional as it keeps the conversation attached to the artifact, which means anyone picking the ticket up later can see exactly what was changed and why. Do not chase feedback over Teams or email if you can avoid it. If it does happen there, capture the resolution back on the Note.

Iterating without losing history

When you revise, you have two reasonable options:

- **Update the original Note** in place with the revised copy or asset, and reply to the comment so the Team Lead knows it is addressed.
- **Create a new Note** with the revision and tag the Team Lead. This keeps each revision as a separate artifact, which some teams prefer for traceability.

Either is acceptable. Talk to your Team Lead about which they prefer for your team's flow.

7. The Pending Approval handoff

Once your ticket is at Pending Approval, you are essentially done with it — unless the client comes back with revisions. There is one piece of housekeeping that matters if you are the last person to complete an Ad Set.

Watch for the last ticket in the Ad Set

Each ticket moves to Pending Approval on its own timeline. But the *AM is only notified* once **every** ticket in the Ad Set has reached that status. That notification is the trigger for the AM to share the AdLab link with the client.

If you complete the last ticket — update the AdLab link

If you are the Copywriter or Designer whose ticket completes the Ad Set, do this before you walk away:

1. Take the AdLab link for the Ad Set you just uploaded.
2. Navigate to the parent Creative Portfolio project (use the Project association on the right side of your ticket).
3. Paste the link into the Most Recent AdLab Link field on the Creative Portfolio.

The AM will be looking for this link when they get their notification. If it is missing, they will ping you directly to get it.

> **How to tell you're closing the Ad Set**
> Look at the Ad Set Deliverables card on your ticket. If every other ticket already shows a Pending Approval status, the one you are working on is the last. That is your cue to update the AdLab link on the Creative Portfolio.

8. Handling client revisions from the AM

Client revisions are common. When they come back, they will not arrive as a Teams message or a forwarded email. We have asked the AM is asked to route them through the ticket itself.

How the AM signals revisions

On the individual ticket needing changes, the AM uses the **Needs Revisions** field in the Creative Deliverable Tracker card. They select one of three values:

- **Copy Revisions Only** — only the Copywriter is needed.
- **Graphic Revisions Only** — only the Designer is needed.
- **Copy and Graphic Revisions** — both are needed.

What automation does when Needs Revisions is set

1. Creates a new revision task for the relevant party (copy, graphic, or both).
2. Kicks Ticket Status back to In Progress.
3. Resets the relevant Approval field(s) from Approved back to Not Submitted.

The AM is also expected to leave a Note on the ticket describing the revisions in plain language. So when you open the ticket, you should see all four of these things in front of you:

- A revision task
- A Note explaining the revisions
- The ticket status is in In Progress
- Your Approval field back to Not Submitted.

Your job on revisions

1. Open the ticket. Read the AM's revision Note carefully.
2. Make the revisions in your usual tools.
3. Upload the updated asset(s) to AdLab as instructed by your team's normal process.
4. Add a Note to the ticket capturing the revised copy or attaching the revised graphic. If you want, reference the original revision request Note from the AM.
5. Complete your revision task.
6. Move your Approval field directly from **Not Submitted** to **Approved** — skip Submitted.

> **Why you skip Team Lead QA on client revisions**
> The Team Lead already approved this ticket once. Sending revisions back through QA would slow client turnaround for changes and client approval. If the revisions involve something you'd genuinely like a second set of eyes on, of course loop your Team Lead in informally, but the system does not require it.

How the cycle continues

Once both Approval fields are Approved again (or the one that was reset is Approved), the ticket re-advances to Pending Approval. When every ticket in the Ad Set is back at Pending Approval, the AM is once again prompted to share the revised assets with the client. This loop can run more than once on the same Ad Set if the client has multiple rounds of feedback.

9. When a ticket is closed

Once the client signs off and there are no more revisions, the AM marks each ticket as **Completed Deliverable**. This is a closed status. Once a ticket is at Completed Deliverable:

- It is considered final and no more revisions are eligible against it.
- If additional work is needed later, the SAS submits a new ticket. Completed tickets should be not reopened.
- The SAS handles the actual Meta upload and implementation from AdLab. That is outside your scope.

From here the cycle resets and the next Creative Refresh is scheduled on the project's cadence (typically 90 days).

10. Reference — key fields and statuses

Ticket Status

Value	Meaning
New Deliverable	Ticket just submitted by the SAS. No one has opened it yet.
In Progress	Either Copy or Design (or both) is being worked on. Set this manually when you first open a new ticket.
Pending Approval	Both approval fields are Approved (or one is Not Applicable). Set automatically. Ticket is now with the AM and the client.
Completed Deliverable	Closed status. Client has approved and no further changes are eligible. Set by the AM.

Ad Copy Approval and Graphic Design Approval

Value	Meaning
Not Submitted	Work has not been submitted for Team Lead QA yet. Default state when the ticket is created.
Submitted	You moved your work into QA. Team Lead is notified to review.
Approved	Team Lead signed off. When both fields hit Approved, Ticket Status auto-advances to Pending Approval.
Not Applicable	Used on copy-only or graphic-only tickets for the discipline that is not in play. Ignore this field.

Needs Revisions (set by the AM)

Value	What it triggers
Copy Revisions Only	Creates a copy revision task for the Copywriter. Resets Ad Copy Approval. Ticket Status → In Progress.
Graphic Revisions Only	Creates a graphic revision task for the Designer. Resets Graphic Design Approval. Ticket Status → In Progress.
Copy and Graphic Revisions	Creates tasks for both. Resets both Approval fields. Ticket Status → In Progress.

Turnaround times

Requested Date of Completion is set automatically by the ticket-creation automation, based on Ad Set size:

- **Ad Sets with 4 or fewer deliverables** — 3 business days for copy, 5 business days for graphics.
- **Ad Sets with 5 or more deliverables** — 5 business days for copy, 7 business days for graphics.

You do not need to set or adjust these dates. They populate when the ticket is created.

11. Quick-reference cheat sheet

Where do I find my work?

- **Tickets → My Open Deliverable Tickets** — the queue of tickets you can still move forward.
- **Tickets → My Deliverables Awaiting Approval** — tickets parked with the AM/client.
- **Tasks → All Tasks** — every incomplete task assigned to you, sorted by due date.

Standard new-ticket flow

1. Open the ticket. If status = New Deliverable, move it to In Progress.
2. Read Deliverable Information + Evergreen Creative Information.
3. Do the work in your usual tools.
4. Add a Note with the final copy or graphic on the ticket.
5. Complete your Complete Ad Copy / Complete Graphic Design task.
6. Move Ad Copy Approval or Graphic Design Approval → Submitted.
7. Respond to Team Lead comments on the Note; loop until Approved.
8. Ticket auto-advances to Pending Approval. You are done unless revisions come back.

Revision flow (from the AM)

1. AM sets Needs Revisions on the ticket. Status returns to In Progress and your Approval field resets.
2. Read the AM's revision Note.
3. Make the changes. Upload the updated assets where your team normally does.
4. Add a Note capturing the revised output.
5. Complete the revision task.
6. Move your Approval field from Not Submitted → Approved (skip Submitted — no Team Lead QA on client revisions).

Three rules to remember

- **Never edit the Deliverable Folder Name** — it links the Ad Set together and drives automation.
- **Notes are output, tasks are input** — submit final work as a Note; use tasks to track what is left to do.
- **If you close the Ad Set, update the AdLab link** — paste it into Most Recent AdLab Link on the Creative Portfolio so the AM does not have to chase you.