

HubSpot User Guide: Creative Refresh

Overview

This guide explains how the Creative Refresh process works in HubSpot for Paid Social services. The Creative Refresh is an automated workflow that ensures clients receive updated creative assets on a regular cadence (typically 30, 60, or 90 days).

Current Scope:

- Account Managers (AMs) handle client conversations and asset collection
- Social Advertising Specialists (SAS) submit requests and implement approved creatives
- Creative Team remains in Quickbase (for now)

Key Benefits:

- Automated reminders ensure refreshes happen on schedule
 - Clear task assignments keep everyone accountable
 - Status tracking provides visibility throughout the process
 - Date automatically resets when refresh is complete
-

Understanding the Creative Portfolio Project

What is a Creative Portfolio?

The Creative Portfolio is a special type of Project record in HubSpot that houses all creative-related work for a Paid Social service. Think of it as the central hub for managing creative refreshes and storing creative assets.

Key Features:

- Associated with each Paid Social Service
- Named "Creatives - [COMPANY NAME]"
- Contains Creative Refresh Control properties
- Stores creative assets as attachments
- Tracks refresh dates, cadences, and status

Accessing the Creative Portfolio

1. Navigate to the Paid Social Service record
2. Look for the Projects section
3. Click on the Creative Portfolio project (titled "Creatives - [COMPANY NAME]")

Creative Portfolio Structure

Left Sidebar - Creative Refresh Controls:

- Creative Refresh Cadence (30, 60, or 90 days)
- Creative Refresh Date (calculated date field)
- Creative Refresh Status (workflow driver)
- Creative Refresh Reset (manual override option)

Center Panel - Quick View Card:

- Displays upcoming refresh date
- Shows selected cadence
- Displays current refresh status
- Shows days remaining until refresh

Attachments Section:

- Store client-provided creative assets
 - Upload visual assets as they're received
 - Maintains history of creative files
-

The Creative Refresh Workflow

Workflow Timeline

The Creative Refresh process follows an automated timeline:

16 Days Before Refresh Date:

- System generates tasks for Account Manager
- AM discusses refresh with client
- AM collects new assets (if provided)

On Refresh Date:

- System generates task for SAS
- SAS submits creative request to Quickbase
- Creative team develops deliverables

After Approval:

- System generates implementation task for SAS
- SAS implements creatives in campaigns
- Date automatically resets for next refresh

Refresh Status Stages

The **Creative Refresh Status** field drives the entire workflow once the refresh period has started. Here are the stages in order:

1. **Refresh Request Submitted** - (Initial trigger when date approaches)
 2. **Deliverables Submitted** - SAS has submitted request to creative team
 3. **Creatives Pending Approval** - Assets are being reviewed by client
 4. **Creatives Completed & Approved** - Client has approved deliverables
 5. **Creatives Implemented** - SAS has implemented in campaigns (triggers date reset)
-

Step-by-Step Process

Phase 1: Account Manager Preparation (16 Days Before)

What Triggers This: When the Creative Refresh Date is within the next 16 days, two tasks are automatically generated for the Account Manager.

Tasks Generated:

1. "Discuss Creative Refresh for [Client Name]"
2. "If New Assets Are Provided, Create Paid Social Change Request"

Account Manager Actions:

1. **Have the conversation with the client** about the upcoming refresh
2. **If client provides new assets:**
 - Submit a Paid Social Change Request through HubSpot
 - Attach or reference the new client-provided assets
3. **If no new assets:**
 - Still complete the tasks
 - The SAS & Creative Team will utilize previous assets for the next round of refreshes.

Important: This 16-day window allows time for the back-and-forth conversations that typically happen with clients.

Phase 2: SAS Request Submission (On Refresh Date)

What Triggers This: When the Creative Refresh Date equals today, a new task is generated for the SAS.

Task Generated:

- "Create Paid Social Deliverables for Refresh" (due in 3 business days)

SAS Actions:

Step 1: Access the Quickbase Request System

1. Open the Creative Portfolio project
2. Click the **Quickbase Requests** tab
3. Click **Submit Paid Social Creative Request**

Step 2: Complete the Creative Request Form in Quickbase

Step 3: Mark HubSpot Task As Done

1. Click **Save** (through the Add Deliverables flow)
2. Return to the Creative Portfolio project
3. Update **Creative Refresh Status** to "**Deliverables Submitted**"
4. Mark the task as complete

Phase 3: Creative Team Development (In Quickbase)

What Happens:

- Creative team receives the request in Quickbase
- They develop new creative assets
- Assets are shared with Account Manager for client review
- AM presents to client through AdLab

Your Role: Wait for notification from AM or Creative Team that assets are ready for client review.

When Notified:

1. Navigate to the Creative Portfolio project
2. Update **Creative Refresh Status** to "**Creatives Pending Approval**"
3. Wait for final client approval

Note: In the future, when the Creative Team migrates to HubSpot, they may be responsible for updating this status field themselves.

Phase 4: Final Approval & Implementation

What Triggers This: When the Account Manager confirms that the client has approved the new creatives through AdLab.

AM or SAS Action:

1. Update **Creative Refresh Status** to "**Creatives Completed & Approved**"
2. This automatically generates an implementation task for the SAS

Task Generated:

- "Implement New Creatives for Refresh"

Step 1: Access Approved Creatives

Step 2: Implement in Campaigns

Important: If some creatives are approved while others are still in revision:

- Leave the task open until ALL deliverables are implemented
- You can extend the due date if needed by clicking on the task and adjusting the due date field

Step 3: Mark Complete and Reset Date

Once ALL creatives are implemented:

1. Mark the "Implement New Creatives for Refresh" task as complete
2. Update **Creative Refresh Status** to "**Creatives Implemented**"
3. The system automatically resets the Creative Refresh Date

Automation Happens: When you move to "Creatives Implemented," automation calculates the next refresh date based on the selected cadence:

- 30 days → 30 days from today
- 60 days → 60 days from today
- 90 days → 90 days from today

The **Creative Refresh Status** also resets to blank, ready for the next cycle.

Manual Overrides and Special Situations

Changing the Refresh Cadence

If the client's package changes or they request a different refresh cadence:

 **Consult with your Team Lead first** before making any cadence changes.

To Change Cadence:

1. Open the Creative Portfolio project
2. Locate **Creative Refresh Cadence** in the left sidebar
3. Click the dropdown and select the new cadence (30, 60, or 90 days)
4. Use the Creative Refresh Reset option (see below) to recalculate the date

Using Creative Refresh Reset

The **Creative Refresh Reset** field provides a manual way to recalculate the refresh date based on the current cadence.

When to Use:

- After changing the refresh cadence
- If the refresh date needs to be manually rescheduled
- When correcting an error in the automation

How to Use:

1. First, ensure **Creative Refresh Cadence** is set to the desired interval
2. Locate **Creative Refresh Reset** field
3. Change the dropdown from blank or "No" to **"Yes"**
4. Save the record
5. The automation re-triggers and calculates: Today + [Cadence] = New Refresh Date

Important: This field should **ONLY** be used when manually rescheduling. Don't use it as part of the normal workflow—the automation handles date resets automatically when you complete the refresh.

Manually Adjusting the Refresh Date

You can manually select a specific refresh date using the date picker, but this should be rare.

 **Consult with your Team Lead and department leadership** before manually adjusting dates.

To Manually Set a Date:

1. Click on the **Creative Refresh Date** field
2. Use the date picker to select your desired date
3. Click save

Why This Should Be Rare:

- The automation works best when allowed to run without manual intervention
 - Manual changes can create confusion about when refreshes are actually due
 - The cadence-based system ensures consistency across clients
-

Best Practices and Important Reminders

Do's ✓

- **Let the automation run** - The system works best when allowed to follow its natural cycle
- **Update statuses promptly** - Status changes drive the workflow forward
- **Consult Team Leads** - Check with leadership before making cadence or date changes
- **Document conversations** - Use notes to track client discussions about refreshes
- **Keep tasks updated** - If timelines extend, adjust task due dates accordingly
- **Store assets in the Portfolio** - Upload client-provided assets to the Creative Portfolio attachments

Don'ts ✗

- **Don't manually edit dates without reason** - Let automation handle date resets
- **Don't skip status updates** - Each status triggers the next phase of work
- **Don't mark tasks complete prematurely** - Wait until ALL deliverables are truly done
- **Don't change cadences without approval** - These are typically tied to client packages
- **Don't use Creative Refresh Reset casually** - This is for manual overrides only

Common Mistakes to Avoid

1. **Editing the Creative Refresh Date unnecessarily** - This is a calculated field that updates automatically. Only change it when absolutely required for the client relationship.
2. **Forgetting to update Creative Refresh Status** - The status field is your workflow driver. Each status change triggers automation and creates tasks.
3. **Marking implementation complete too early** - If some creatives are still pending approval, keep the task open. Don't mark it done until everything is implemented.

4. **Not consulting Team Leads on changes** - Date and cadence changes should be discussed with leadership before being made.

Status Workflow at a Glance

None

[No Status - Blank]



(16 days before refresh date)



[Refresh Request Submitted]



(SAS submits Quickbase request)



[Deliverables Submitted]



(Creative Team develops assets)



(Assets sent to client for review)



[Creatives Pending Approval]



(Client approves through AdLab)



[Creatives Completed & Approved]



(SAS implements in campaigns)



[Creatives Implemented]



(Refresh Date automatically resets)



[Status returns to blank - ready for next cycle]

Quickbase Integration

Submitting Creative Requests

Even though you're working in HubSpot, creative requests still go through Quickbase (for now).

Access Path: Service Record → Creative Portfolio Project → Quickbase Requests Tab → Submit Paid Social Creative Request

Why the Embedded Form: The Quickbase form is embedded directly in HubSpot, so you don't need to switch between systems. This maintains workflow efficiency while the Creative Team remains in Quickbase.

Future Changes: Once the Creative Team migrates to HubSpot, this process will be streamlined further. The request submission may move entirely to HubSpot, and Creative Team members may handle their own status updates.

Troubleshooting

Tasks Aren't Generating

If tasks don't appear after crossing the 16-day threshold:

1. Refresh the page (sometimes takes a few seconds for automation to run)
2. Check that the Creative Refresh Date is actually within 16 days
3. Verify the Creative Portfolio is properly associated with the Service
4. Contact your Team Lead if tasks still don't appear

Date Didn't Reset After Implementation

If the date doesn't automatically update after marking "Creatives Implemented":

1. Refresh the page and wait 30 seconds
2. Verify you moved the status to "Creatives Implemented" (not just completed the task)
3. Check that Creative Refresh Cadence has a value selected
4. Use the Creative Refresh Reset option as a manual override if needed
5. Contact your Tristan Storr if the issue persists

Can't Find the Creative Portfolio

If you don't see a Creative Portfolio project on a Paid Social Service:

1. Check the Projects section on the Service record
2. Look for a project titled "Creatives - [Company Name]"
3. Click "View all associated Projects" if needed

4. If no Creative Portfolio exists, contact your Tristan Storr

Wrong Cadence Selected

If you notice the wrong refresh cadence is set:

1. Do NOT change it without approval
 2. Check the client's service package to verify correct cadence
 3. Consult with your Team Lead before making changes
 4. Document the reason for the change
 5. Use Creative Refresh Reset after changing cadence to recalculate the date
-

Future Creative Migration

The process described in this guide is designed to work for both the current state (Creative Team in Quickbase) and the future state (Creative Team in HubSpot).

Expected Changes:

- Creative requests may be submitted entirely within HubSpot (no Quickbase forms)
- Creative Team may update status fields themselves
- Additional automation may be added for Creative Team notifications
- The core workflow (tasks, statuses, date resets) will remain the same

What Won't Change:

- The 16-day trigger for Account Manager tasks
- The task generation and assignments
- The status-driven workflow progression
- The automatic date reset upon completion
- The role responsibilities (AM for client conversation, SAS for implementation)

Updates to Documentation: This guide will be updated as the Creative Team migration progresses. Check for updated versions or reach out to your Team Lead if you notice the process has changed.