

Creative Refresh Workflow

Role-Based Cheat Sheet

A quick reference for who does what across the Creative Refresh lifecycle. Use this to orient yourself before opening the full workflow diagram.

The 5 Phases at a Glance

- 1. Refresh Trigger** — 15 days before the Creative Refresh Date, AM is prompted to discuss with the client.
- 2. Deliverable Setup** — SAS creates Deliverables; Copywriter and Designer are assigned tasks.
- 3. Internal QA** — Team Leads review copy and design before anything goes to the client.
- 4. Client Approval** — AM shares the Ad Lab link; revisions loop back to Copy, Design, or both.
- 5. Implementation** — SAS implements approved creatives; the next refresh is auto-scheduled.

Account Manager (AM)

Owns the client relationship through the refresh cycle.

Stage	What You Do	What Triggers / Follows
Refresh Prompt	Receive task + email 15 days before Creative Refresh Date. Discuss the upcoming refresh with the client.	Triggered automatically when Creative Refresh Date = Today + 15.
Determine if Refresh is Needed	If refresh is requested, document requirements in a Note activity on the Creative Project. If no refresh is needed, move Creative Refresh Status to "No Refresh Requested."	"No Refresh Requested" auto-schedules the next refresh per the selected Cadence.
Share with Client	Once Creative Refresh Status = "Creatives Pending Approval," receive a task to share the Ad Lab link with the client.	Triggered when all Deliverables in the folder reach Pending Approval.
Handle Revisions	If the client requests changes, select Copy Only, Graphic Only, or Both in the Needs Revisions field on the affected Ticket(s). Document the requested changes in a Note activity.	Selecting a revision type moves the Ticket back to In Progress and creates the right tasks.
Close the Loop	When the client approves, manually move Creative Refresh Status to "Creatives Completed & Approved." Receive email confirmation once SAS finishes implementation.	Approval triggers the SAS implementation task and email.

Social Advertising Specialist (SAS)

Submits Deliverables and implements approved creatives.

Stage	What You Do	What Triggers / Follows
Submit Deliverables	When the Creative Refresh Date hits, receive email + task to submit Deliverables. Create Deliverable Ticket records appropriate for a Client's package.	Each Deliverable spins up Copy and Design tasks for the assigned team members.
Implement Creatives	After AM moves status to "Creatives Completed & Approved," receive email and task to implement the approved creatives.	Triggered by the AM's final approval status change.
Mark Complete	Mark the Implementation Task complete (or manually move status to "Creatives Implemented"). Move each Deliverable Ticket Status to Completed if they are not already.	Completion sends AM an email confirming implementation; next refresh date is auto-scheduled per Cadence.

Copywriter

Drafts and revises ad copy through internal QA and client feedback.

Stage	What You Do	What Triggers / Follows
Receive Copy Task	Get assigned a Copy Task when a Deliverable is created.	Auto-created with each new Deliverable.
Draft & Submit	Document Final Copy via a Note Activity on the Deliverable. Move Copy Approval to "Submitted."	Submission generates a QA Copy Task for the Copywriter TL.
QA Outcomes	If TL approves → no action needed. If TL requests changes → implement edits, re-document Final Copy, move Copy Approval back to "Submitted."	Cycle repeats until TL marks Copy Approval as "Approved."
Client Revisions	If AM marks Needs Revisions = Copy Only or Both, receive a new task. Make changes, complete the task, and move Copy Approval back to "Approved."	Triggers Ticket Status back to Pending Approval once changes are complete.

Copywriter Team Lead

Final internal check on every piece of copy.

Stage	What You Do	What Triggers / Follows
QA Copy Task	Receive a QA Copy Task each time a Copywriter moves Copy Approval to "Submitted."	Auto-assigned at every Copy Approval submission.
Review & Decide	Determine if changes are needed. If yes → kick back to Copywriter (they re-submit). If no → move Copy Approval to "Approved."	Approval is what allows the Ticket to move to Pending Approval.

Graphic Designer

Builds graphics through internal QA and client feedback.

Stage	What You Do	What Triggers / Follows
Receive Design Task	Get assigned a Design Task when a Deliverable is created.	Auto-created with each new Deliverable.
Build & Submit	Document Final Design via a Note Activity on the Deliverable. Move Graphic Design Approval to "Submitted."	Submission generates a QA Design Task for the Design TL.
QA Outcomes	If TL approves → no action needed. If TL requests changes → implement edits, re-document Final Design, move Design Approval back to "Submitted."	Cycle repeats until TL marks Design Approval as "Approved."
Client Revisions	If AM marks Needs Revisions = Graphic Only or Both, receive a new task. Make changes, complete the task, and move Design Approval back to "Approved."	Triggers Ticket Status back to Pending Approval once changes are complete.
Final Ad Lab Update	Update the Most Recent Ad Lab Link property on the Project once finalized ALL creatives in an Ad Set are uploaded.	This is where the AM expects to find the link to share with the Client.

Design Team Lead

Final internal check on every design.

Stage	What You Do	What Triggers / Follows
QA Design Task	Receive a QA Design Task each time a Designer moves Graphic Design Approval to "Submitted."	Auto-assigned at every Design Approval submission.
Review & Decide	Determine if changes are needed. If yes → kick back to Designer (they re-submit). If no → move Design Approval to "Approved."	Approval is what allows the Ticket to move to Pending Approval.

Key Terms & Statuses

Shared vocabulary across roles.

Term / Status	What It Means
Pending Approval	Ticket status set automatically once both Copy and Design Approvals reach Approved.
Creatives Pending Approval	Creative Refresh Status set when all Deliverables in a folder are Pending Approval — this is the cue for AM to share with the client.
Needs Revisions	AM-controlled field on the Ticket (Copy Only / Graphic Only / Both) that routes client feedback to the right team.
Creatives Completed & Approved	AM moves Creative Refresh Status here once the client signs off — this is the trigger for SAS implementation.

Term / Status	What It Means
Most Recent Ad Lab Link	Project-level property updated by Creative team; this is what AM shares with the client.

Reference: Creative Refresh Workflow Map. Full diagram remains the source of truth for branching logic and edge cases.