

58 Steps

Managing Creative Refreshes in Portfolio (Complete Process)

Created By
LP Training

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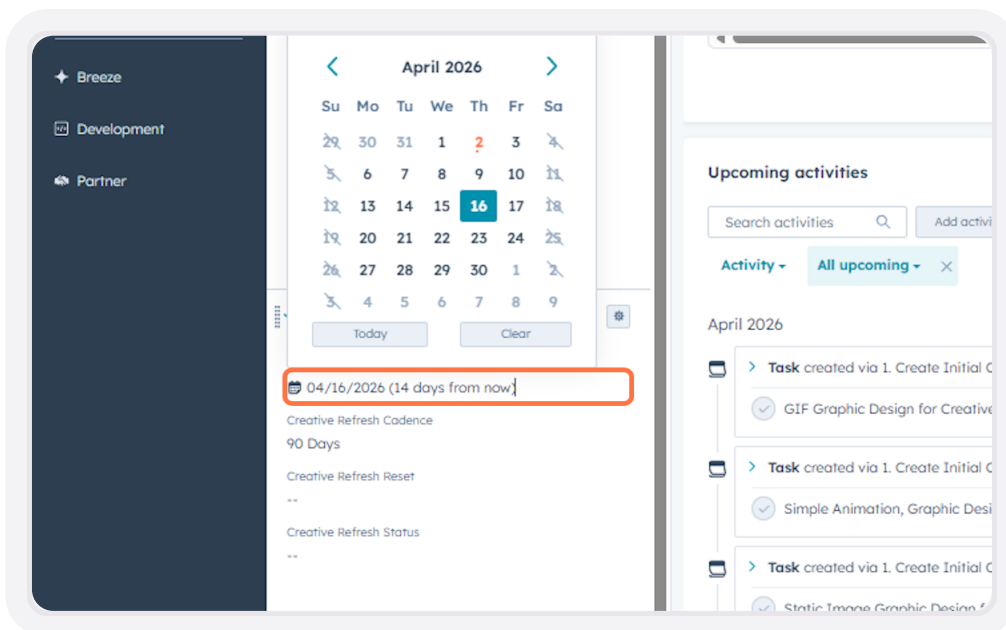
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Kicking Off Creative Refresh [↗](#)

9 Steps

1 Process Begins 14 Days From Creative Refresh Date

This buffer time before the Creative Refresh Date provides the Account Manager time to discuss the upcoming refresh with the client before they are due.



2

AM Receives Email Notification About Upcoming Creative Refresh

has a Creative Refresh due on 4/16/26.

Reach out to the Client to confirm whether they want a refresh and, if so, collect any new visual assets that they want to provide.

If assets are provided, please share them with the SAS (Bo Fogwell).

If assets are not provided, the SAS (Bo Fogwell) will request new Creative deliverables using any existing assets.

3

"Discuss Creative Refresh" Task Generated For AM

Task is due within 2 business days

Task assigned to Tristan Storr via Creative Refresh Workflow Actions Due: Apr 6, 2026 at 6:00 AM MDT

Discuss Creative Refresh for Antilonliness

Due date: **In 2 business days (Monday)** 6:00 AM Reminder: No reminder Set to repeat

Task Type	Priority	Queue	Assigned to
To-do	High	None	Tristan Storr

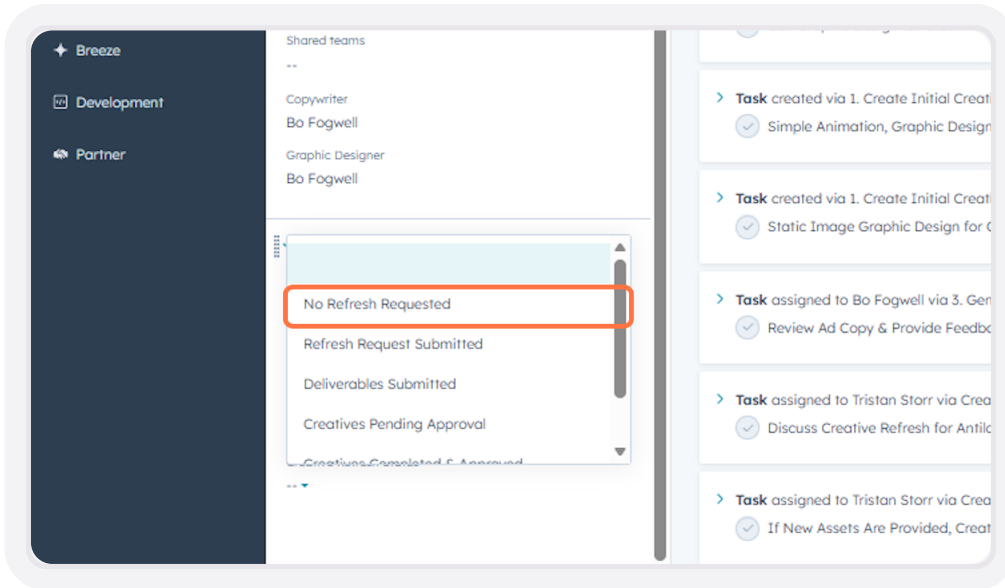
Task Notes

Add description

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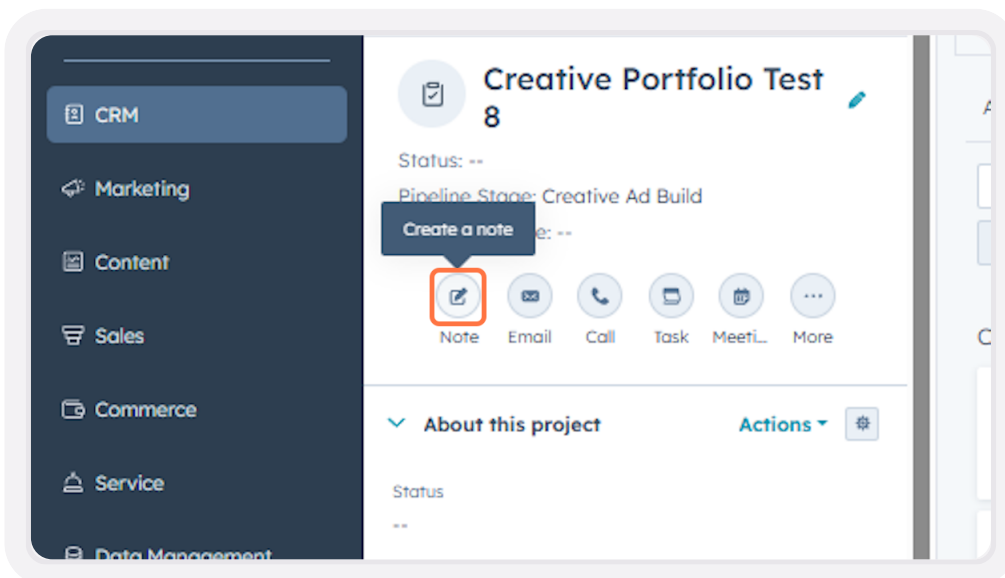
4 If Client Requests NO REFRESH, AM Updates Creative Refresh Status To "No Refresh Requested"

Doing so will bypass all Creative Refresh workflows and immediately reschedule the refresh date based on the selected refresh cadence.

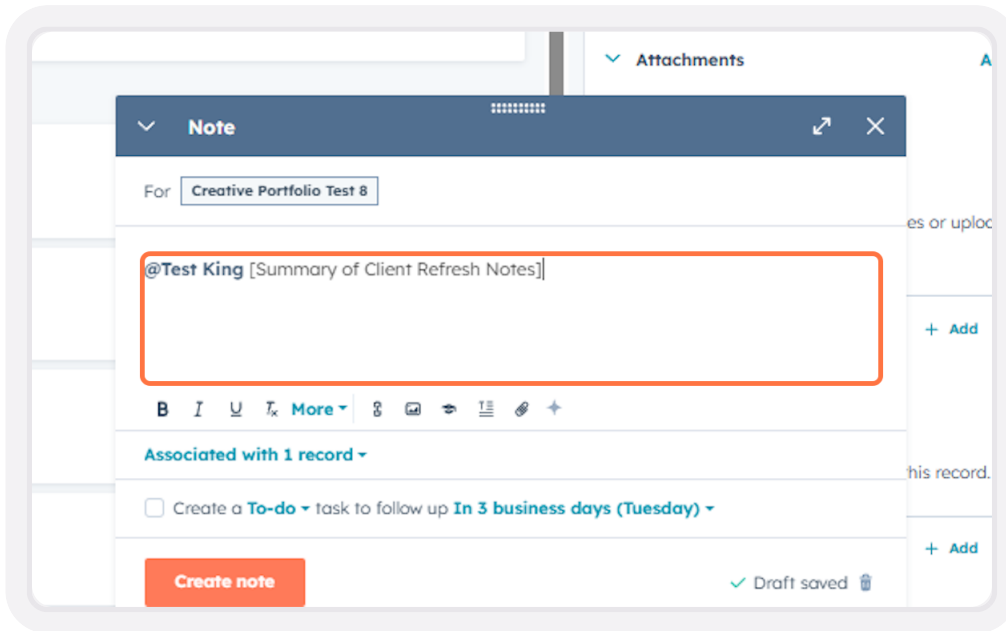


5 IF Client Wants A New Refresh, AM Logs Creative Notes & Assets On Creative Portfolio With A Note

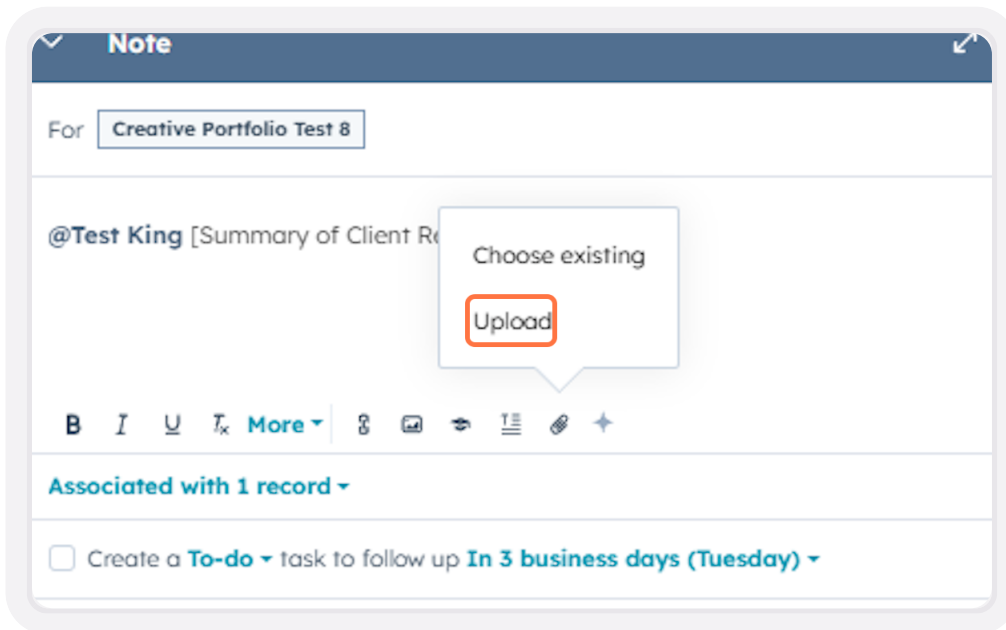
This process is how AMs can communicate requirements for the upcoming refresh to the rest of the team. This replaces the need to submit a Change Request to the SAS in the current process.



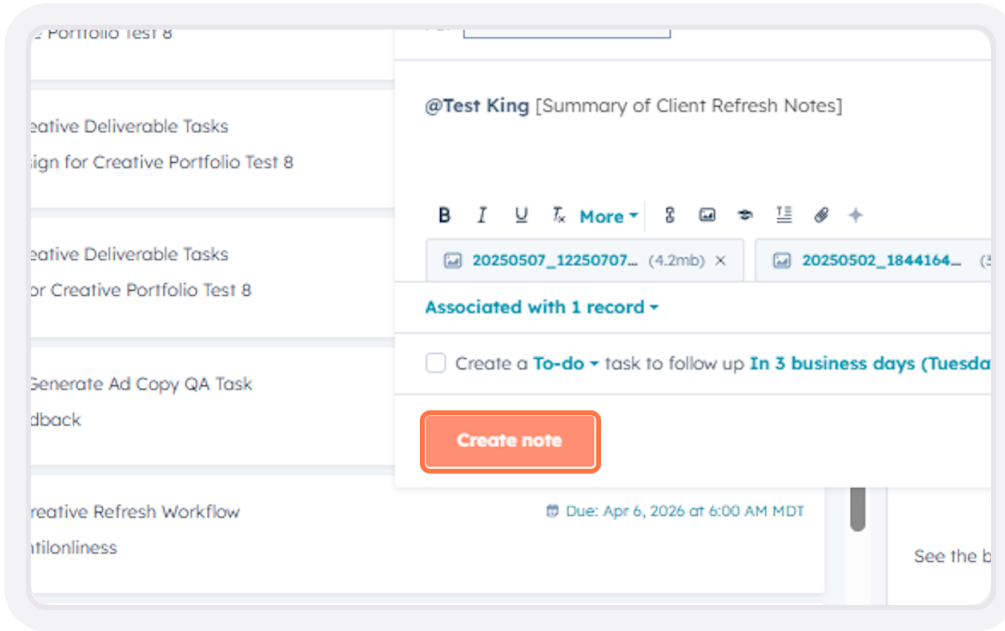
6 BEST PRACTICE: AM Tags SAS On Note For Visibility



7 BEST PRACTICE: Upload Assets To The Note Activity Using The Paper Clip Icon

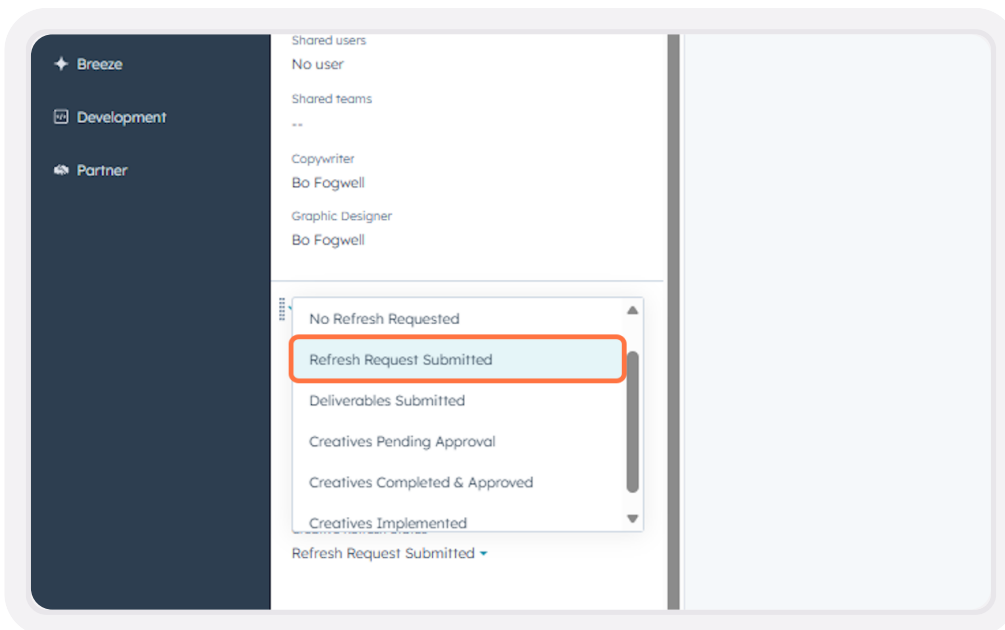


8 When Finished, AM Hits "Create Note"



9 AM Moves "Creative Refresh Status" to "Refresh Request Submitted"

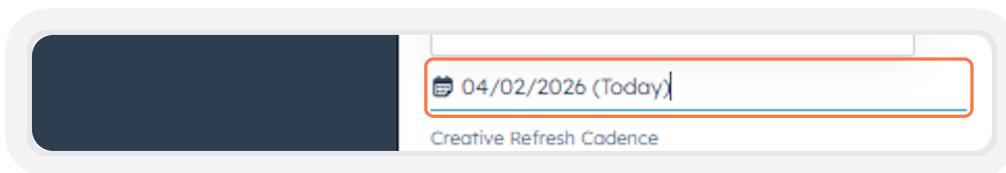
This is important because it indicates to the system that the AM has played their part in kicking off the refresh process. The SAS and Creative Team now are responsible for Deliverable Generation.



Submitting Deliverables

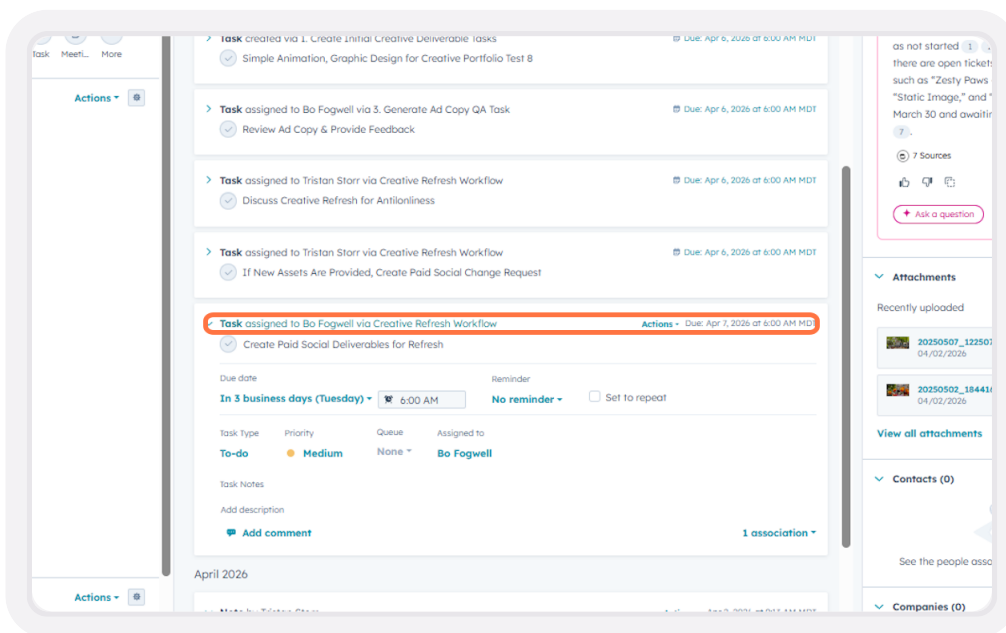
11 Steps

10 When Creative Refresh Date Equals "Today", The Rest Of The Creative Refresh Process Will Begin

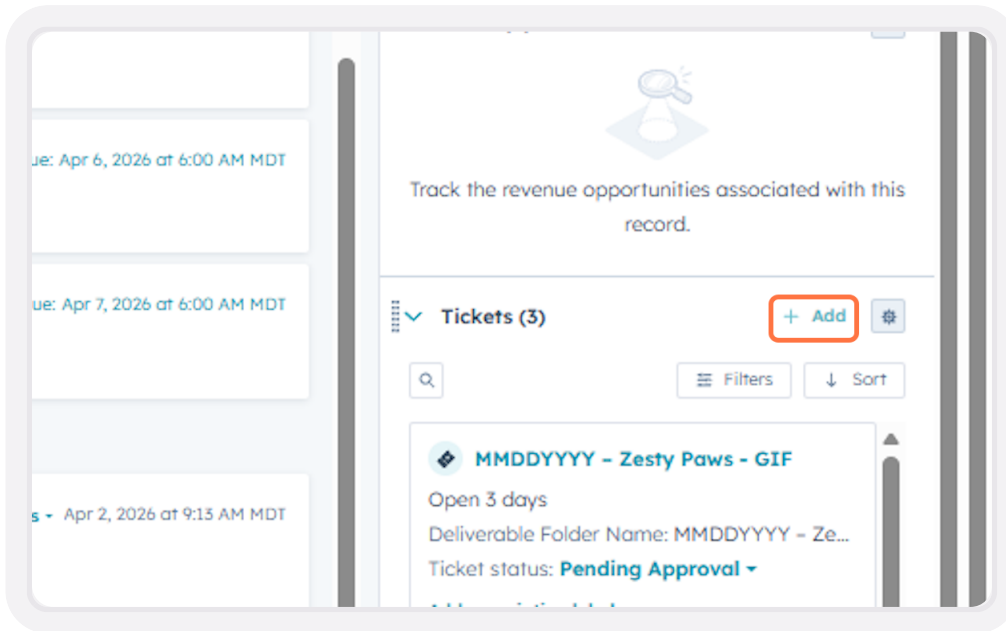


11 A Task For Creative Deliverables Will Be Created For SAS On The Creative Portfolio Project

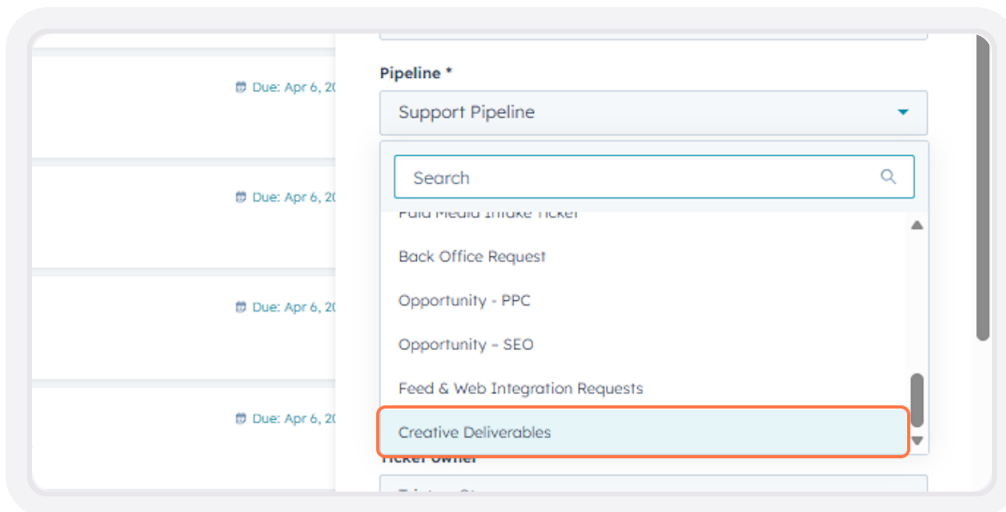
SAS will review the Creative Refresh information left by the AM earlier in the process before using the Tickets system to submit new Deliverables.



12 SAS Hits "+Add" On The Ticket Card To Create New Deliverable

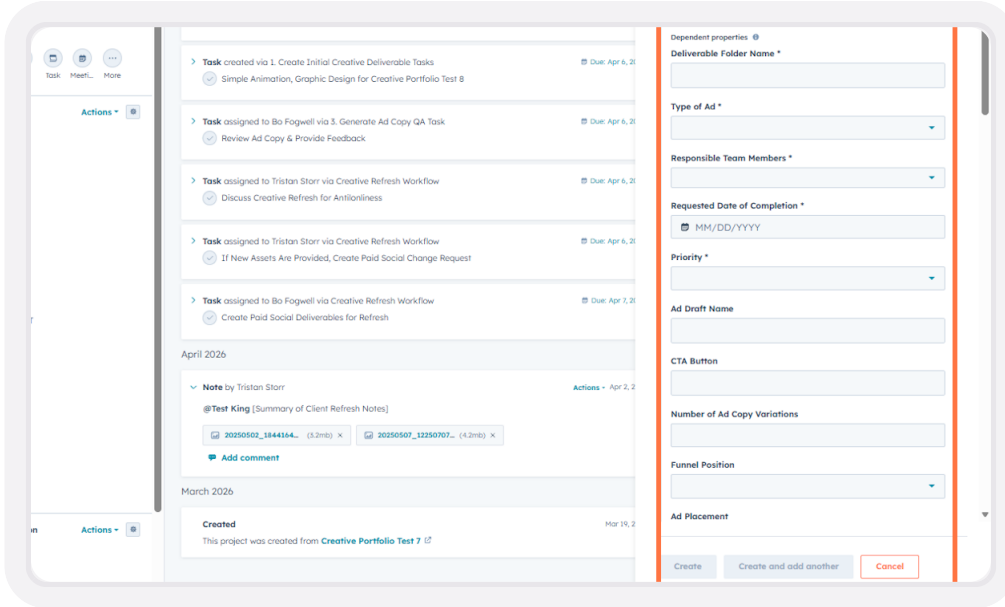


13 SAS Selects "Creative Deliverables" As The Pipeline For The Ticket This action will show conditional fields for Deliverable Creation



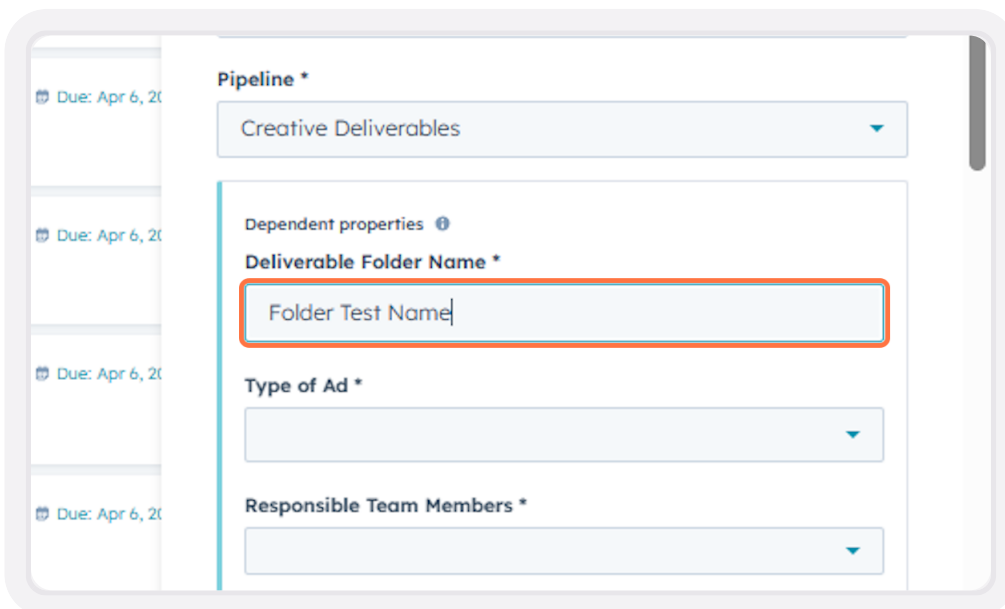
14 SAS Fills Out Dependent Properties Box

All fields needed for Deliverable Creation will dynamically show when the correct pipeline is selected.

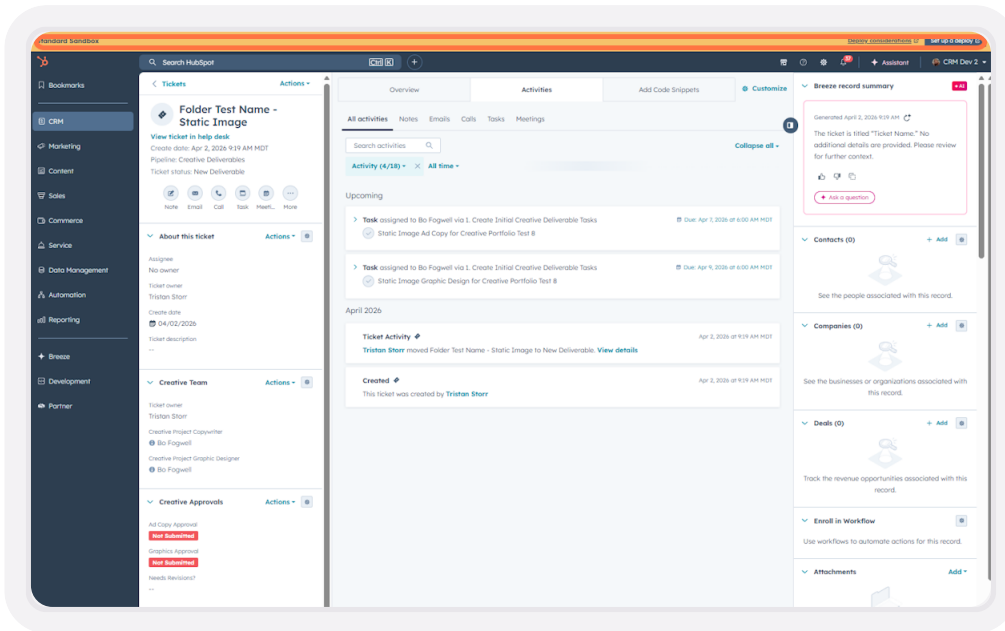


15 SAS Gives The Deliverable A Folder Name

This is an important step as the Folder Name will be used to connect all tickets in the Ad Set. Once a Folder Name is created, it is important that it is not modified on future ticket belonging to the same Ad Set.

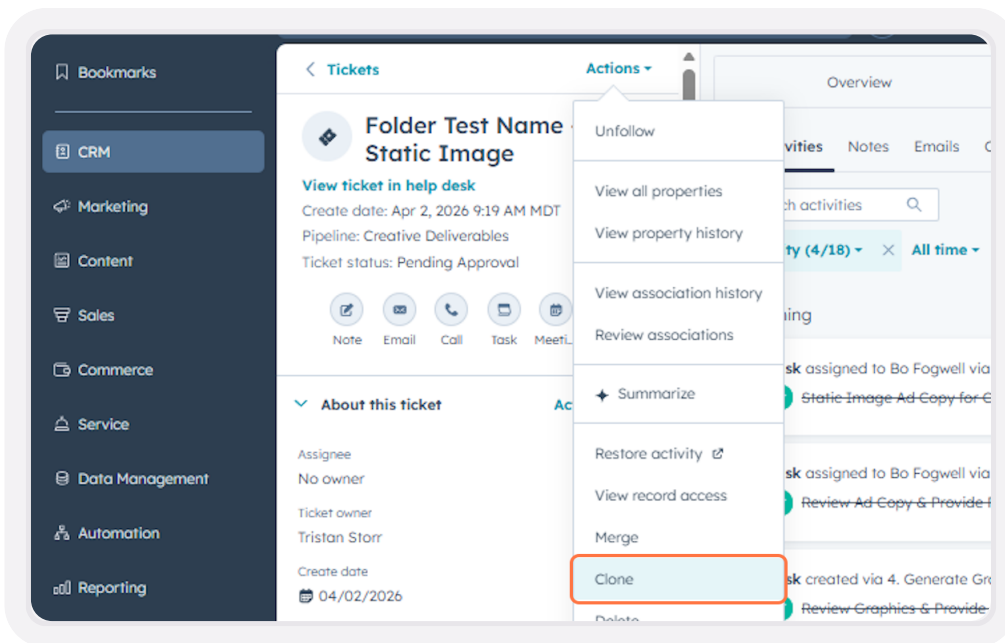


16 SAS Is Directed To The New Ticket Record



17 SAS Clones Deliverable Ticket To Create Additional Deliverable Tickets

Instead of creating more Tickets manually, it is quicker to simply Clone (Actions > Clone) the existing Ticket. HubSpot will prompt you to modify the ticket before finishing the Clone.



18 SAS Modifies The Cloned Ticket As Necessary

Modify the Ticket to the extent necessary. The Type of Ad will most commonly be changed. Deliverable Folder Name should not be touched. Doing so will break future automations.

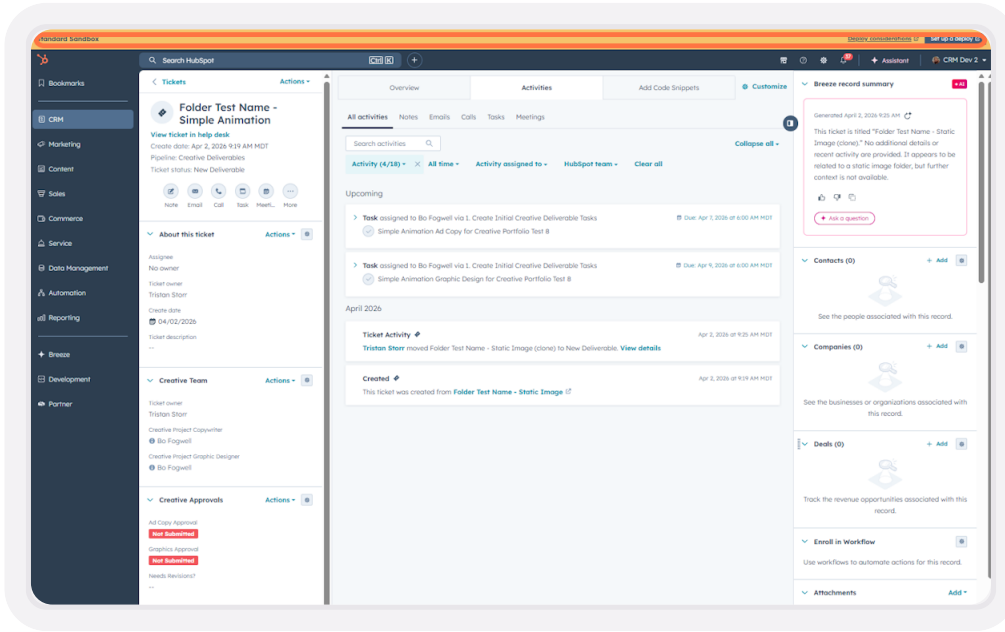
The screenshot shows a form titled "Creative Deliverables" with a dropdown menu. Below the title, there is a section for "Dependent properties" with an information icon. The form contains several fields: "Deliverable Folder Name *" with a text input field containing "Folder Test Name"; "Type of Ad *" with a dropdown menu showing "Static Image" (highlighted with a red border); "Responsible Team Members *" with a multi-select dropdown showing "Copywriter" and "Graphic Designer"; and "Requested Date of Completion *" at the bottom. On the left side of the form, there is a vertical list of dates: "Apr 7, 20...", "Apr 9, 20...", and "Apr 9, 20...".

19 SAS Clones The Ticket

The screenshot shows a "Clone" dialog box. On the left, there is a preview of the ticket details, including a date "Apr 2, 20...", a link "View details", and an "Actions" section with a date "Apr 2, 20...". On the right, there are three input fields: "CTA Button", "Number of Ad Copy Variations", and "Funnel Position". At the bottom of the dialog, there are two buttons: "Clone" (highlighted with a red border) and "Cancel".

20 SAS Is Taken To New, Cloned Ticket

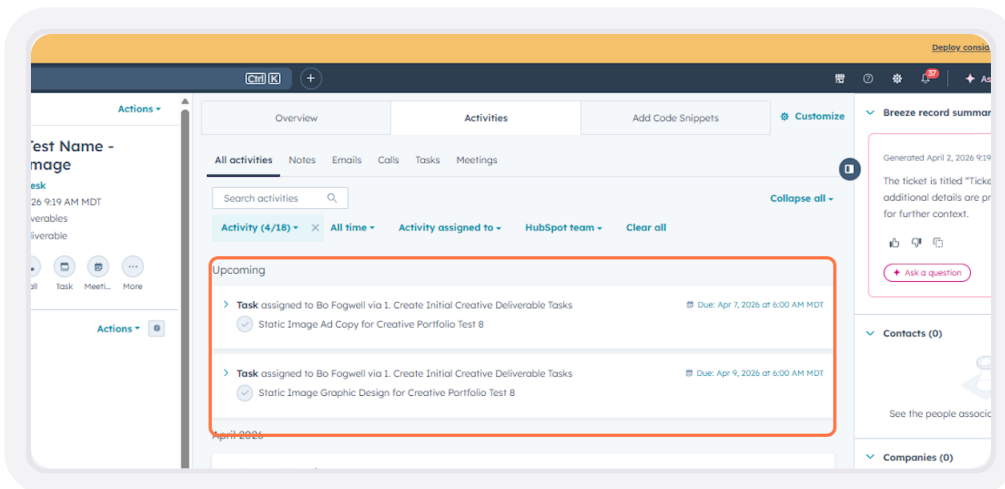
Repeat the cloning process for all Ad Set Deliverables.



=à Managing Deliverable Tickets

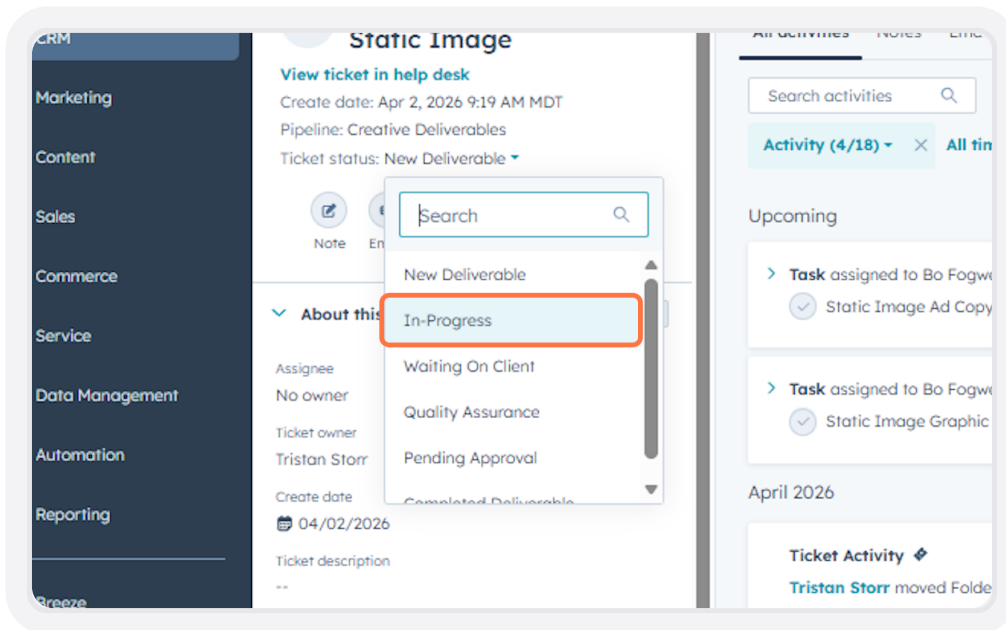
19 Steps

21 Copywriter & Designer Will Be Assigned Tasks On The Deliverable Ticket For Their Respective Responsibilities.

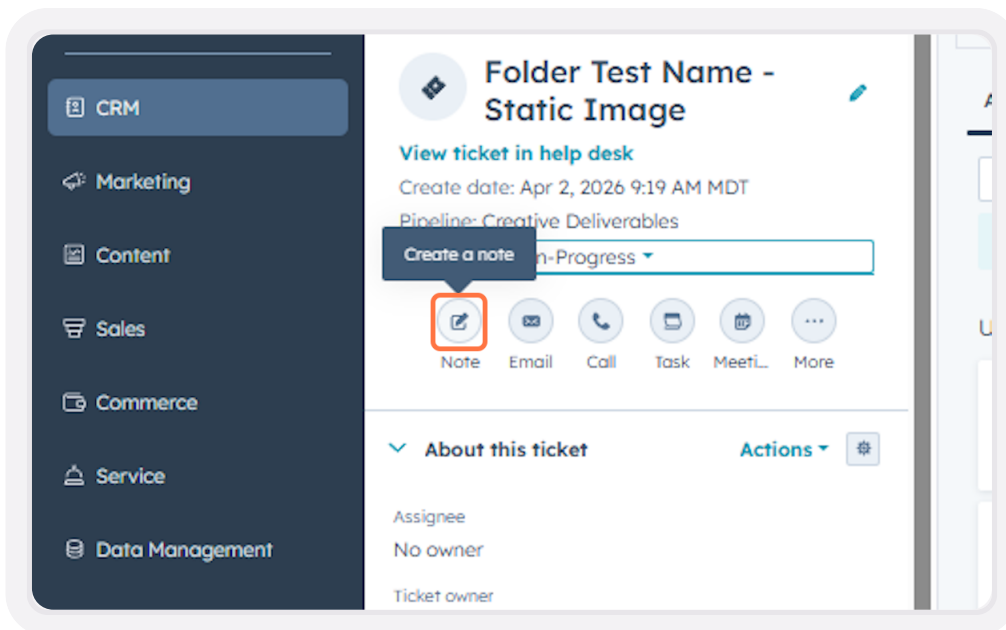


22 Either User Should Move Ticket Status Forward To In-Progress Whenever Work On A Deliverable Begins

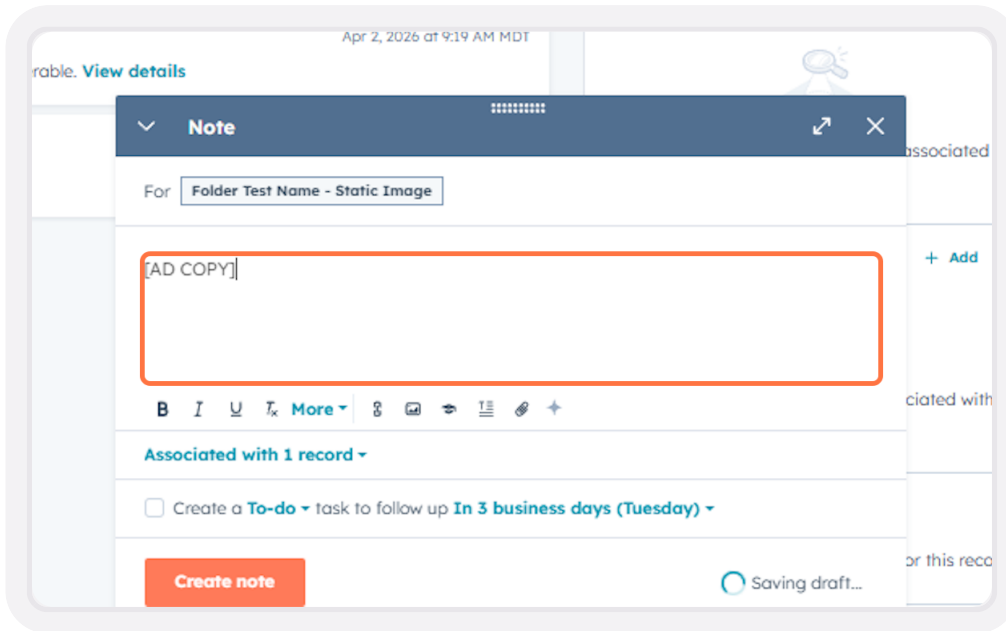
The actual work of writing copy and designing graphics will happen externally outside of HubSpot. The ticket is meant to track progress of each individual deliverable.



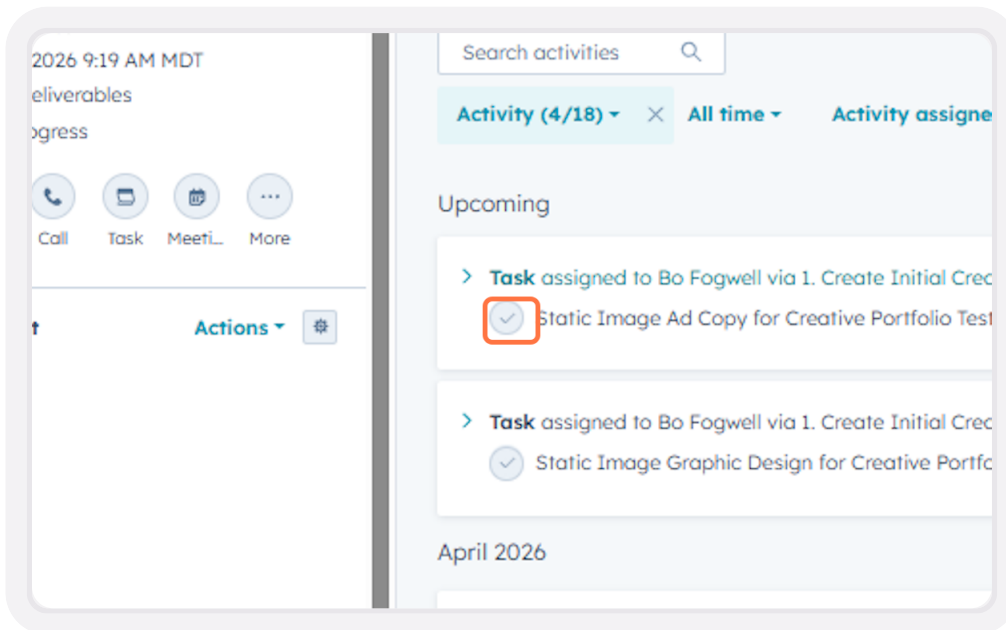
23 When Copy Work Is Completed For A Deliverable, Copywriter Returns To The Ticket And Creates A Note With The Finished Content



24 Copywriter Adds Their Ad Copy And Creates Note

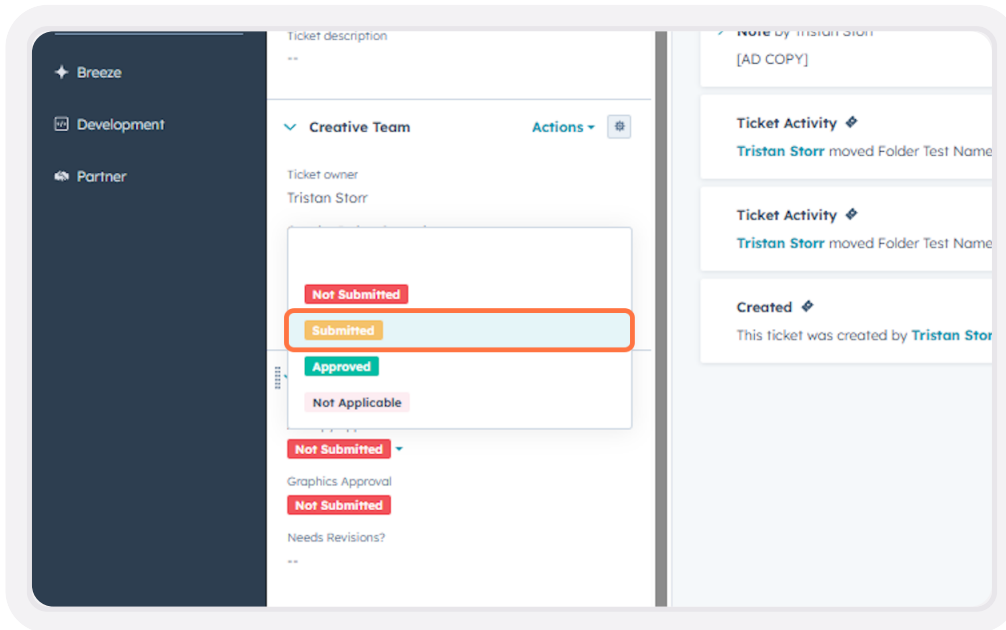


25 Copywriter Marks Their Task As Completed

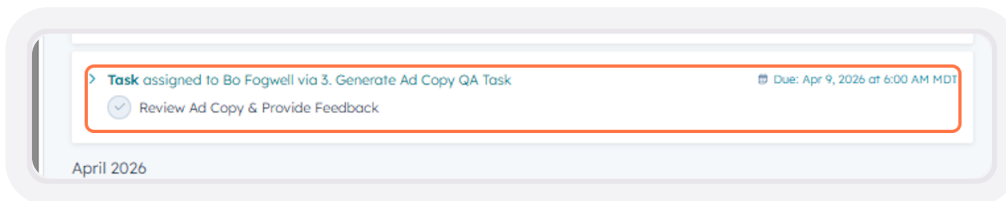


26 Copywriter Moves The Ad Copy Approval Field To "Submitted"

This is a key step because it kicks off the QA process for the Copywriter Team Lead.

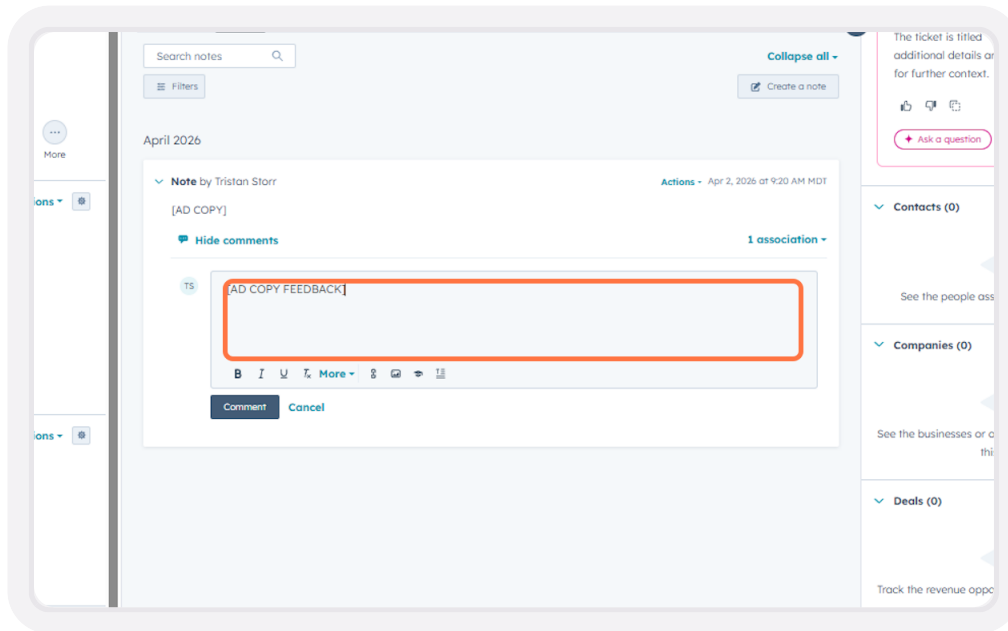


27 New QA Copy Task Is Generated For Team Lead

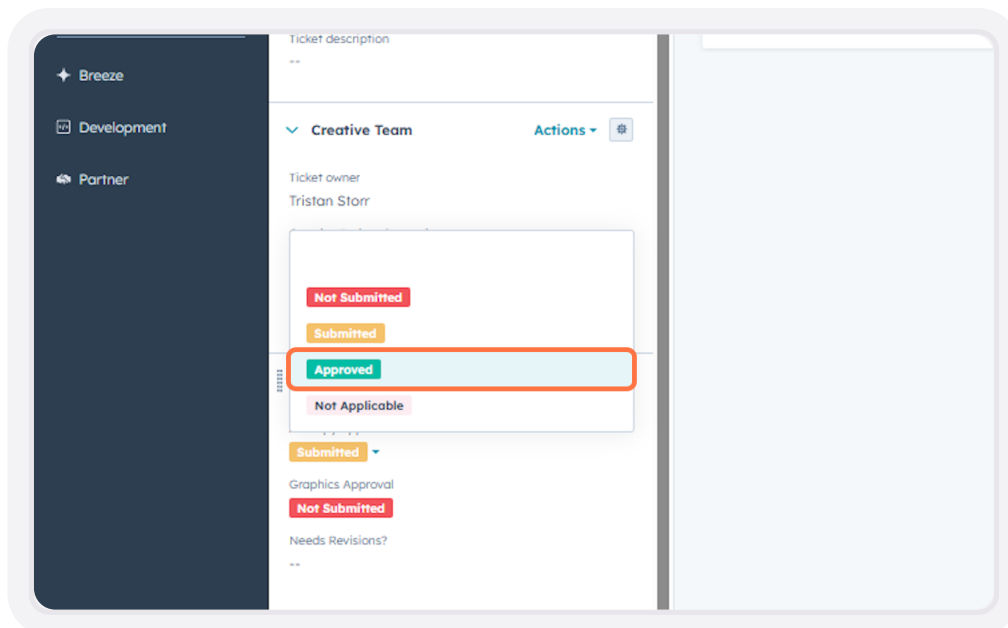


28 Using Comment Feature On The Copy Note, Team Lead Leaves Feedback

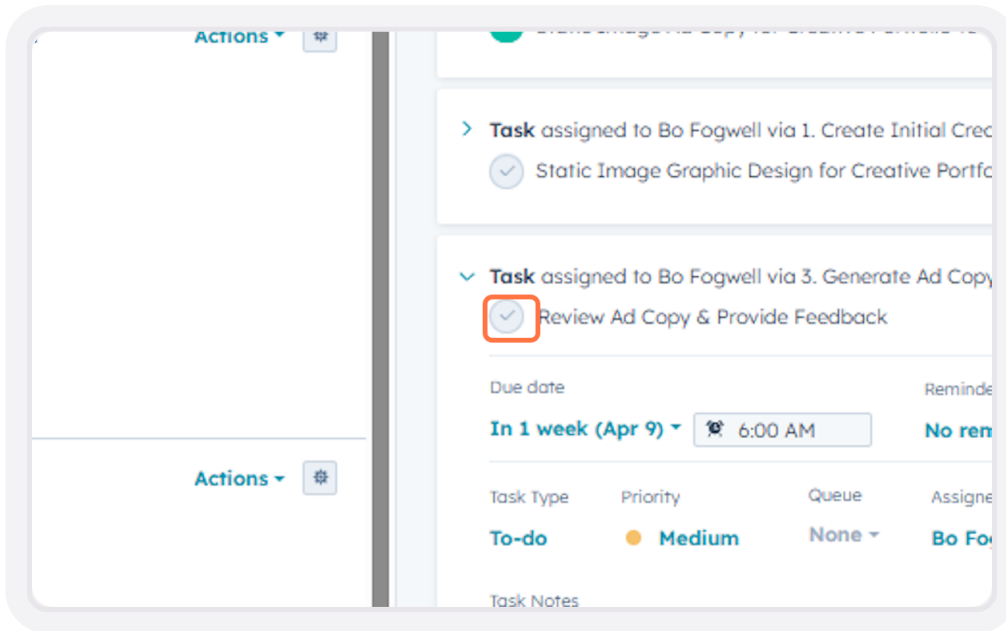
If further changes are necessary, they should be documented through the comments. This provides the Copywriter and their Team Lead the ability to have a documented conversation about feedback within HubSpot.



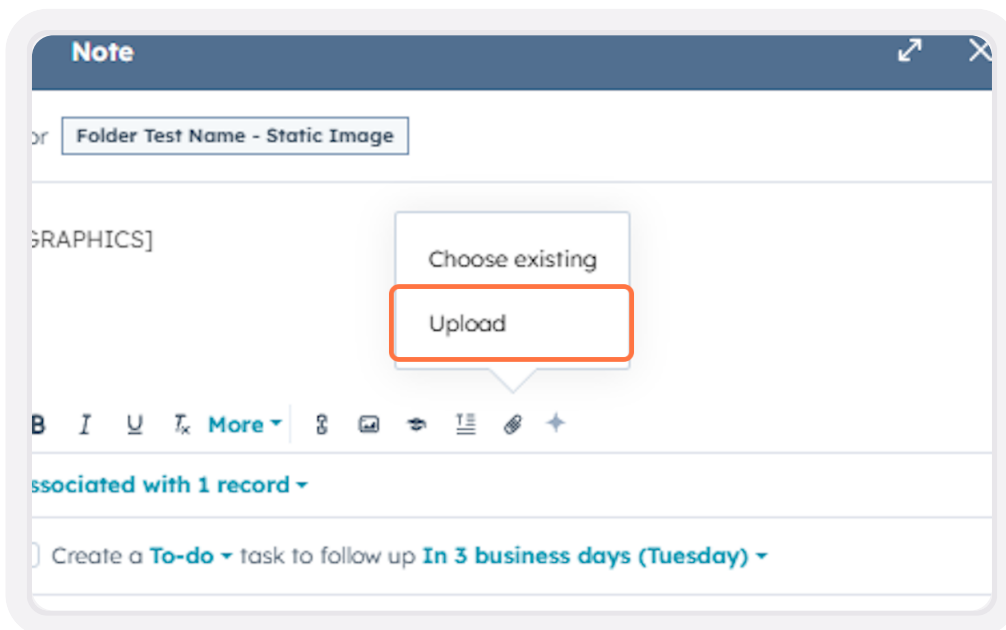
29 Once Copy Is Approved, Team Lead Moves Ad Copy Approval To "Approved"



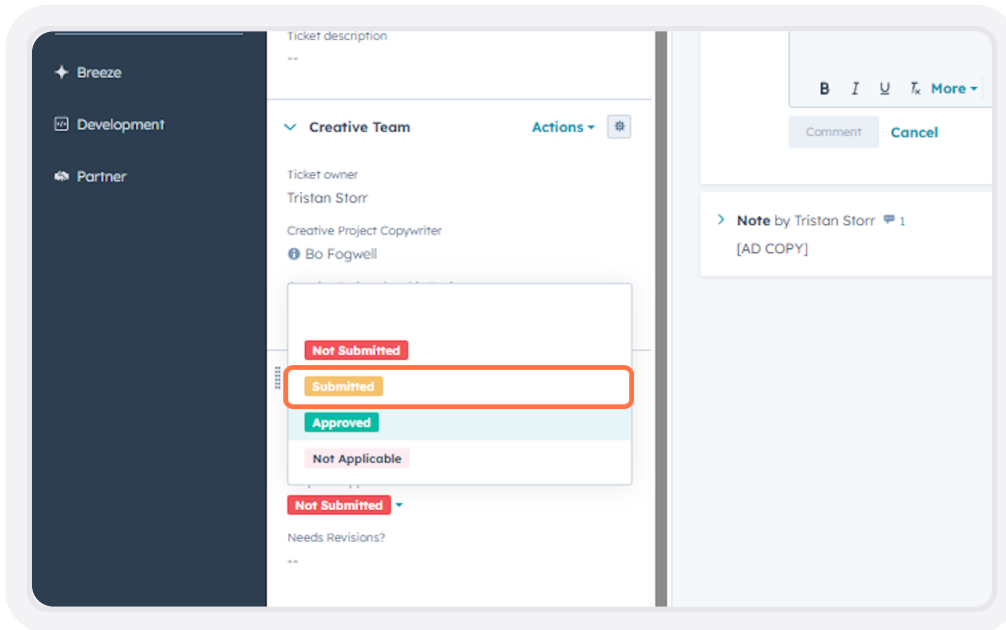
30 Team Lead Marks Their QA Task As Completed



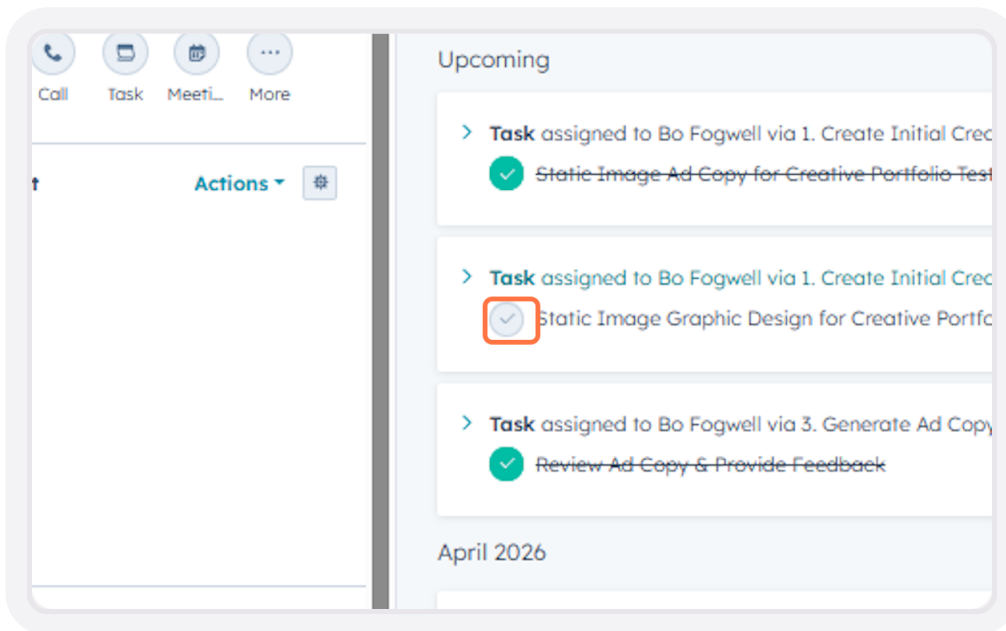
31 For Graphic Design, The Same Process Will Be Followed As Above. Designer Creates Note & Uploads Graphic Assets



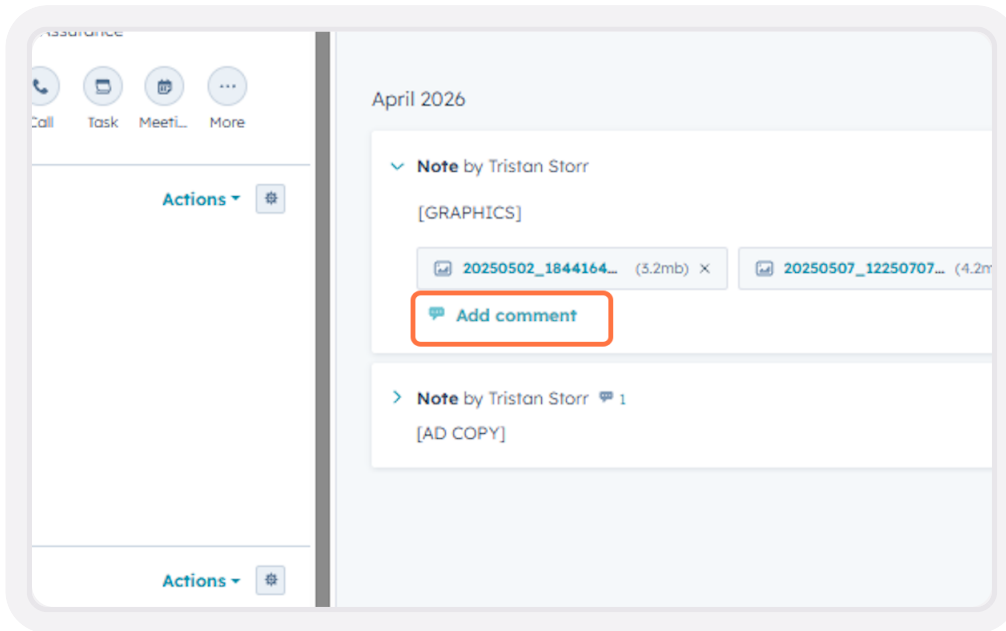
- 32 Graphic Designer Moves Graphic Design Approval To Submitted
This action creates a QA Task for the Graphics Team Lead



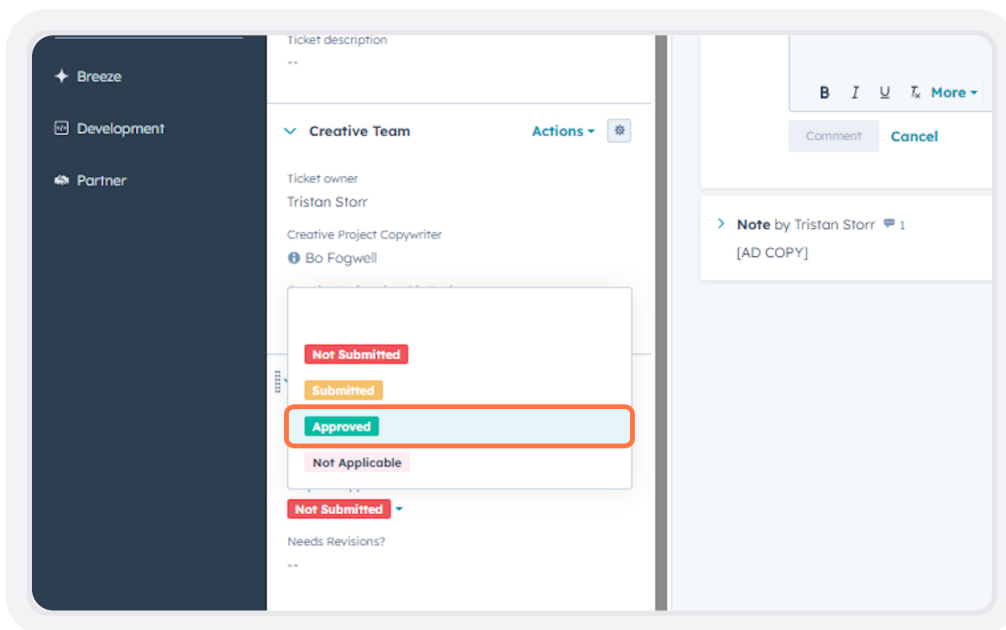
- 33 Graphic Designer Marks Their Task Completed



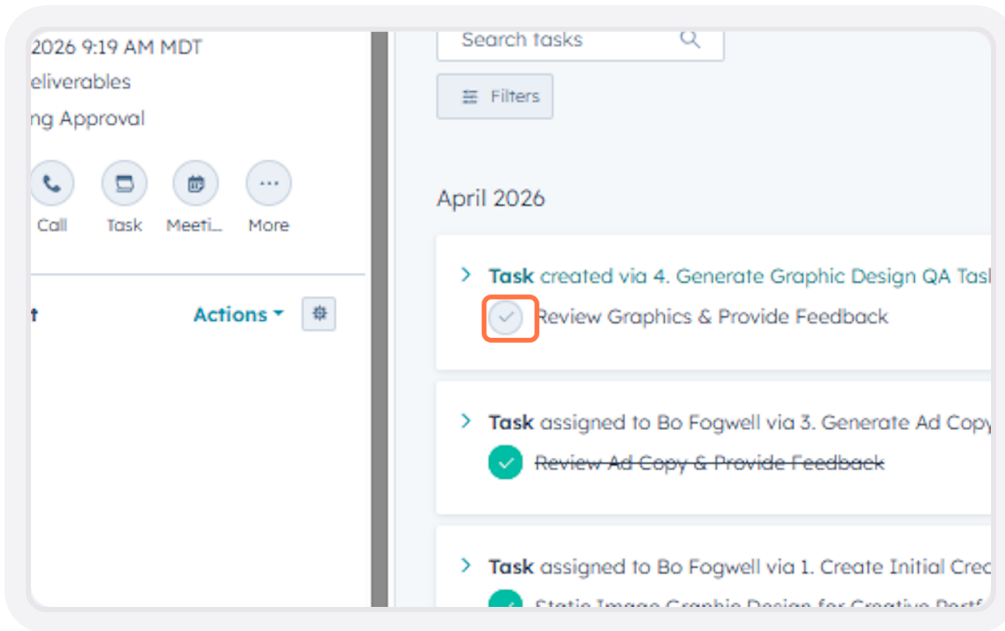
34 Graphics Team Lead Uses Comments On The Graphics Note To Facilitate Feedback



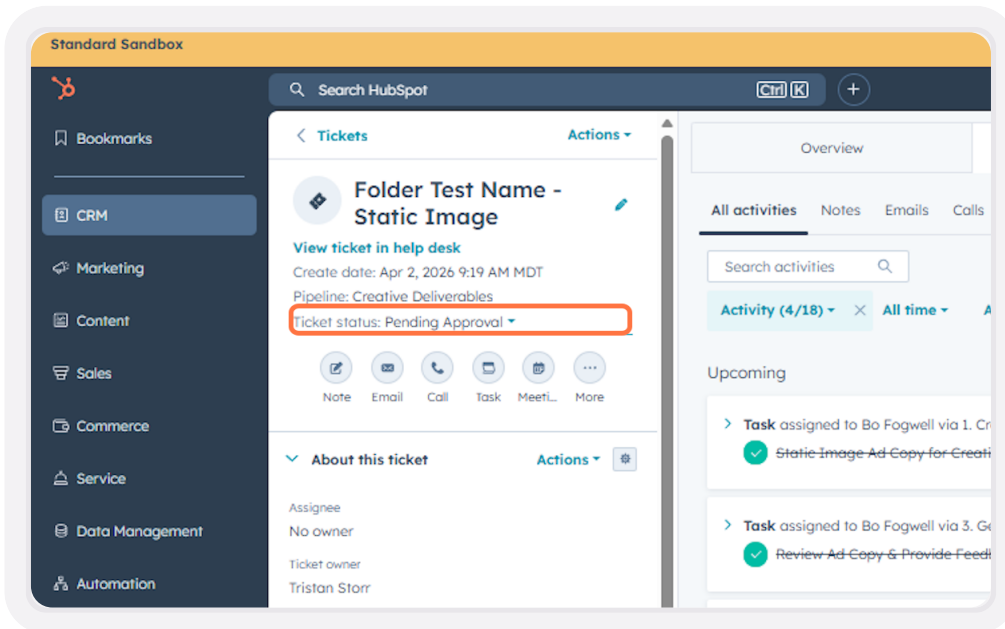
35 When Graphics Have Been Approved, Team Lead Moves Graphic Design Approval To "Approved"



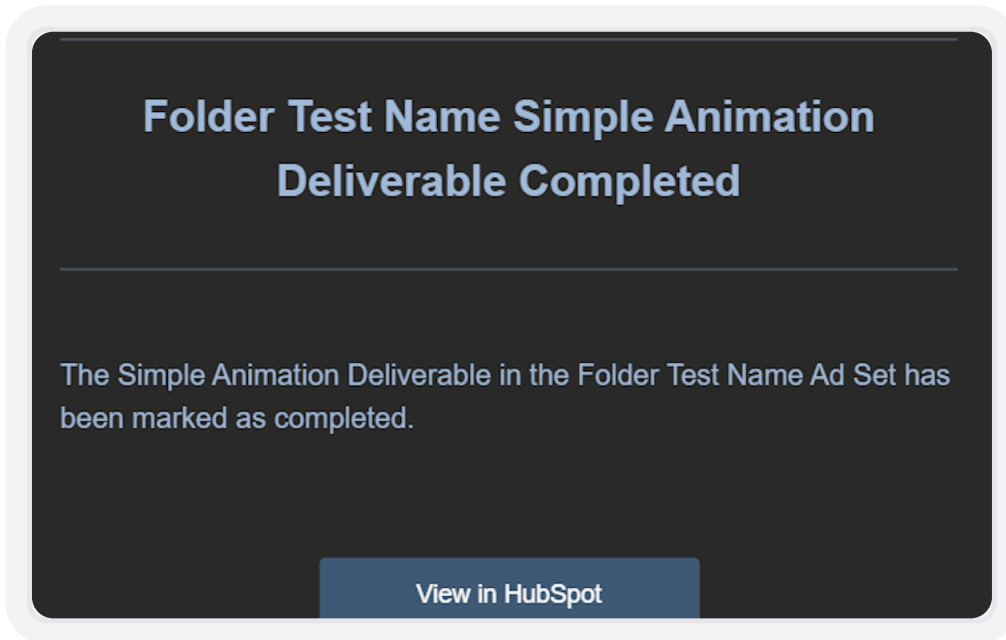
36 Graphics Team Lead Marks Graphics QA Task As Completed



37 Once Both Approval Fields Are Moved To "Approved", Ticket Status Moves Itself Automatically To Pending Approval



- 38 An Email Notification Is Sent To Ticket Owner That A Deliverable Was Completed



- 39 Copywriter & Designer Will Repeat This Process For Each Deliverable In The Ad Set Until All Deliverable Tickets Have Been Approved By Team Leads

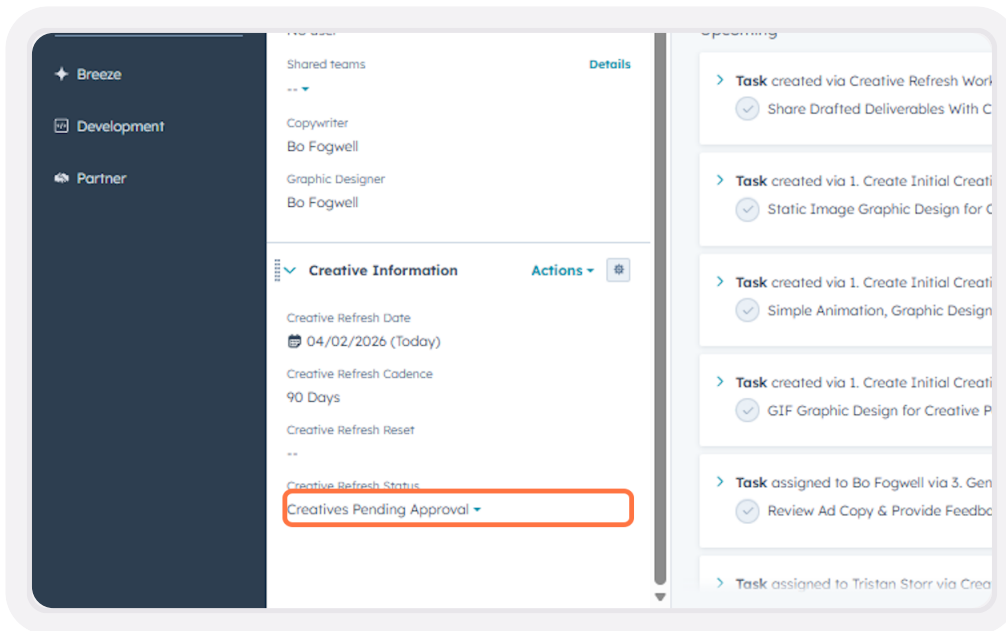


Getting Client Approval

15 Steps

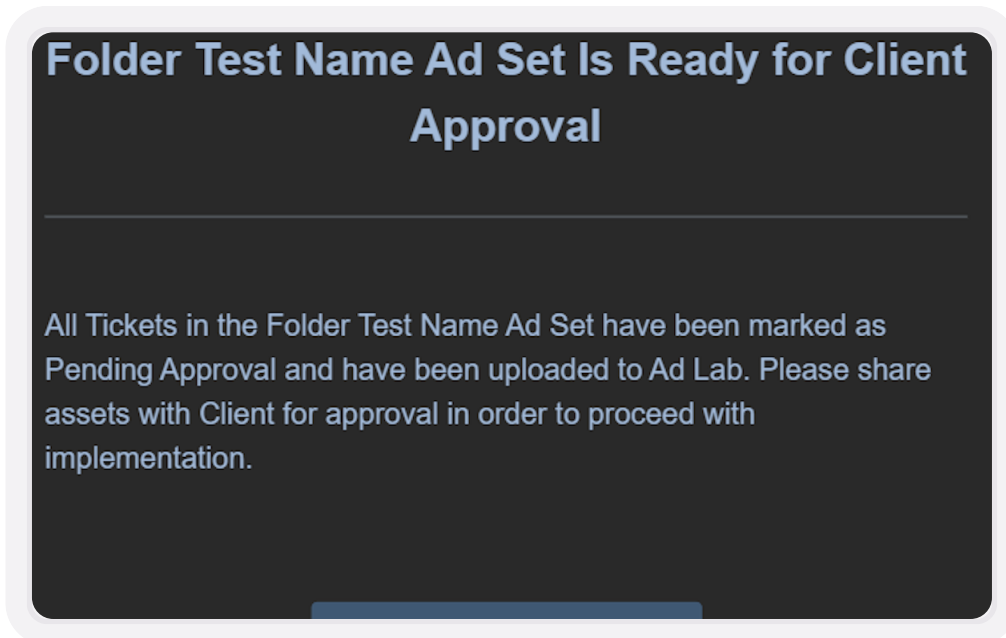
40

When All Deliverable Tickets In An Ad Set Are Completed, The Creative Refresh Status On The Creative Portfolio Will Move To "Creatives Pending Approval"

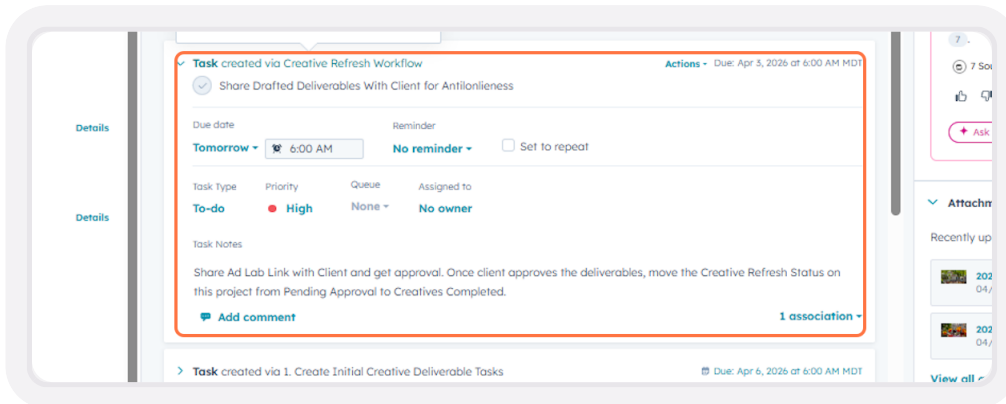


41

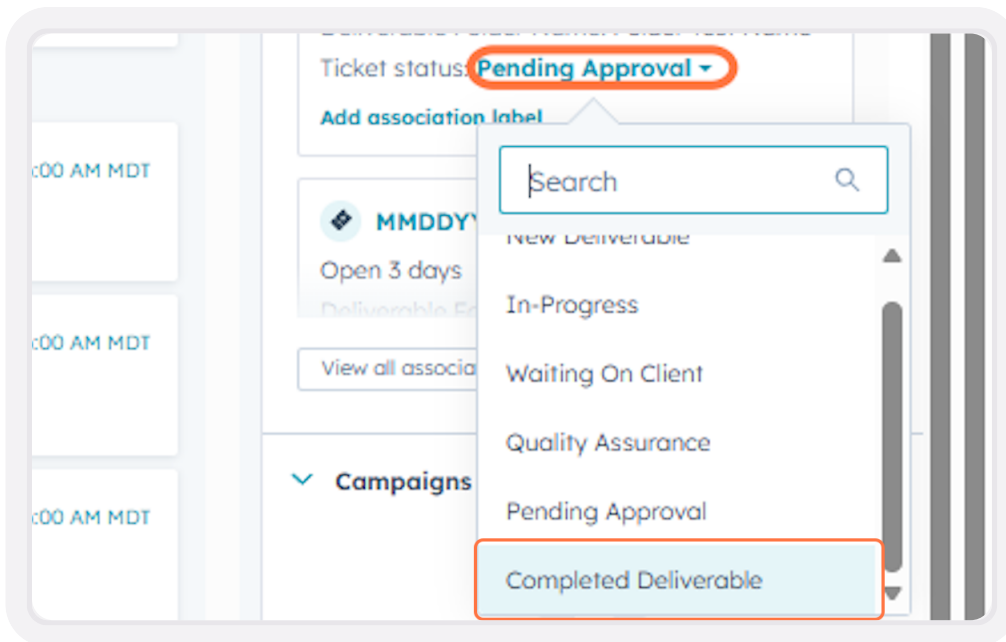
Email Notification Sent To Account Manager Regarding Need For Client Approval



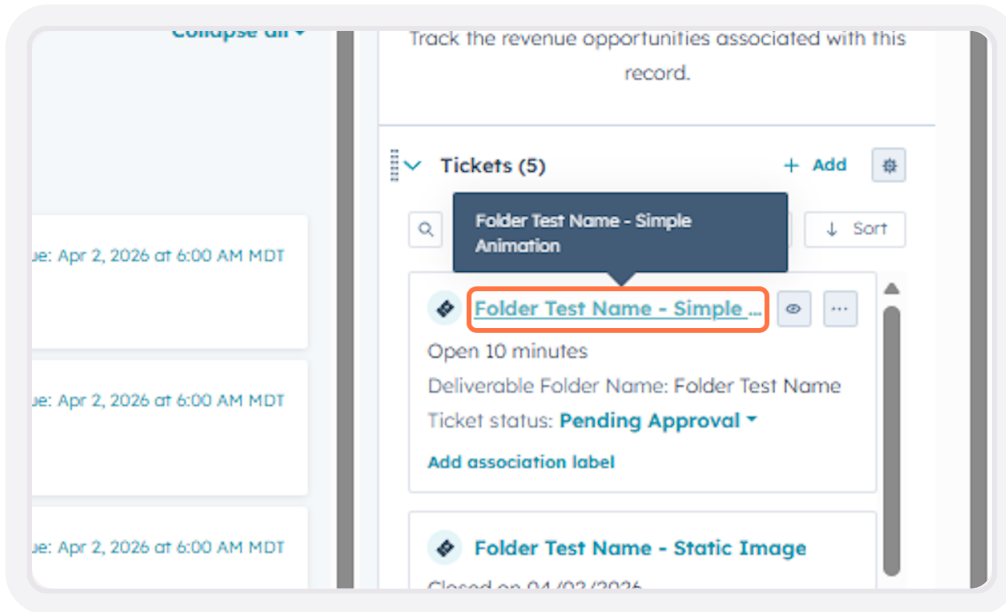
42 New Task Is Generated For AM On The Portfolio For Sharing Ad Lab Link With Client



43 IF Client Approves A Deliverable, AM Should Move The Corresponding Ticket Status to "Completed Deliverable"

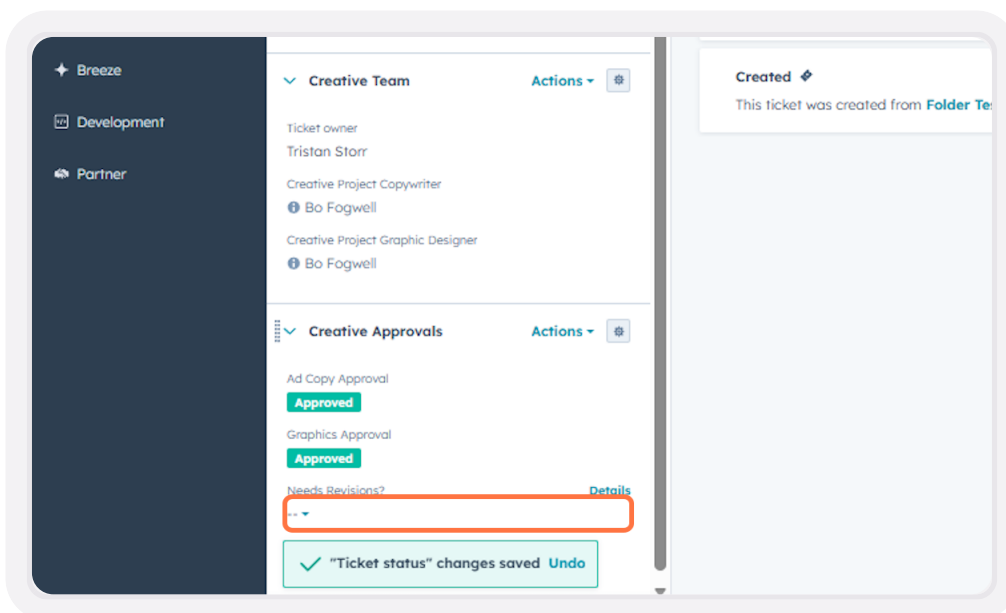


- 44 IF Client Requests Changes, AM Navigates To Corresponding Ticket To Submit Changes



- 45 AM Should Leave The Feedback From The Client In The Form Of A Note On The Deliverable Ticket

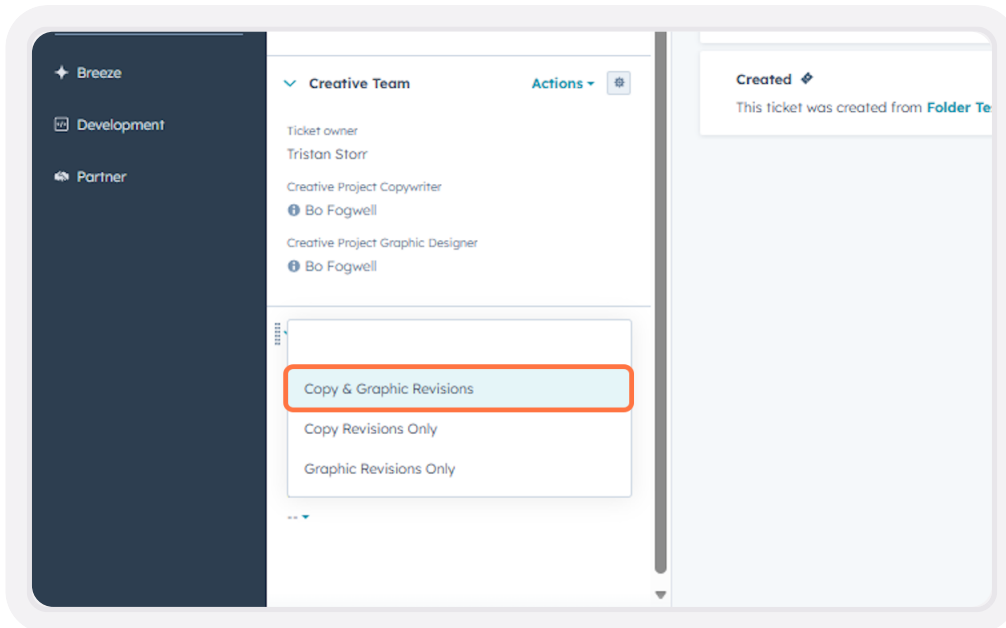
- 46 AM Modifies The Needs Revisions Field To Kick The Ticket Back Into Progress



47

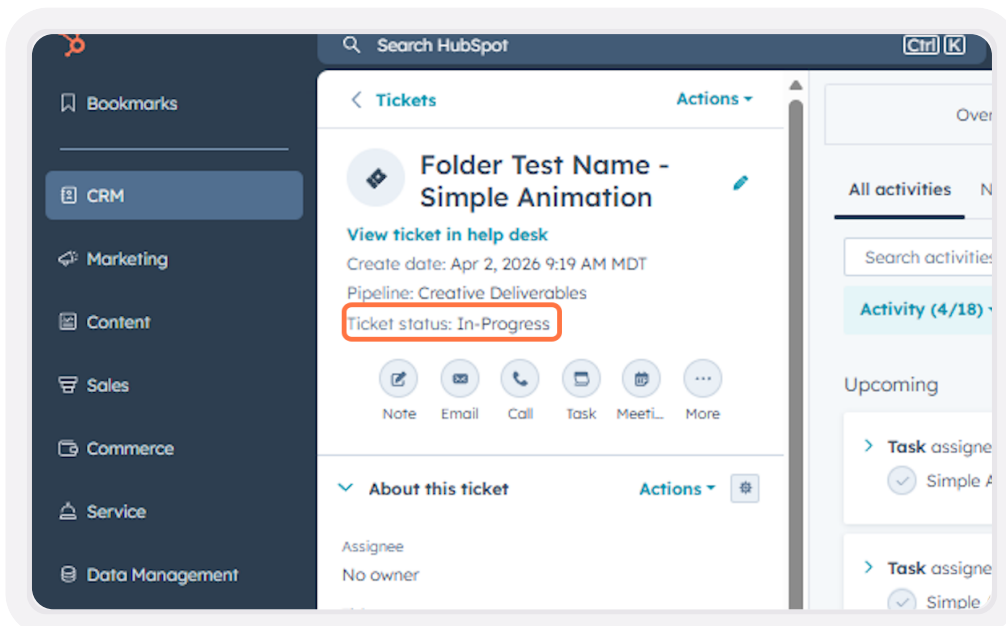
AM Selects What Elements Of The Deliverable Need Modification

Options are Both Copy & Graphics, Copy Only, Graphic Only. This action moves the Ticket status back to In-Progress



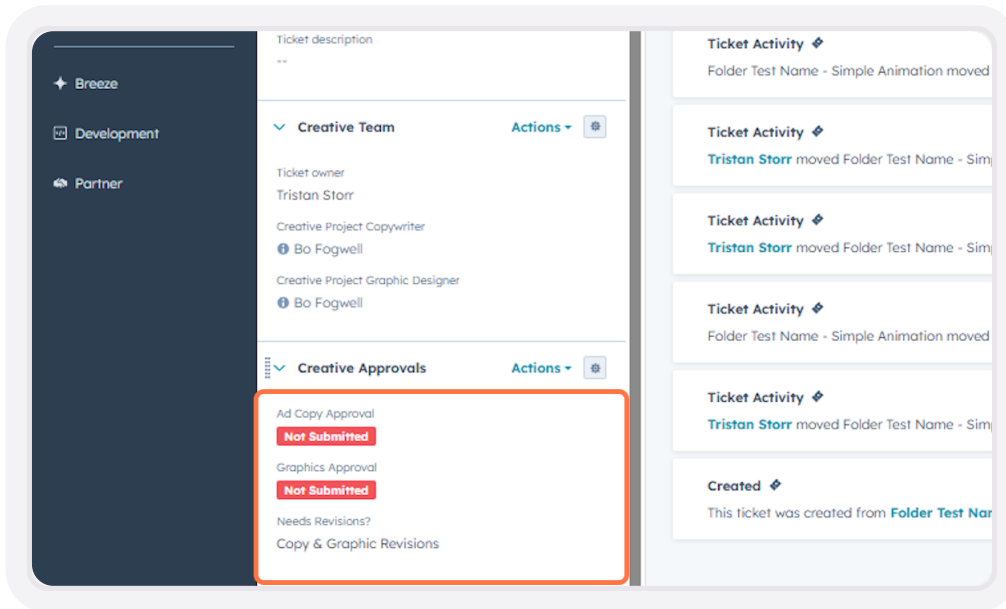
48

Ticket Status Moves To In-Progress



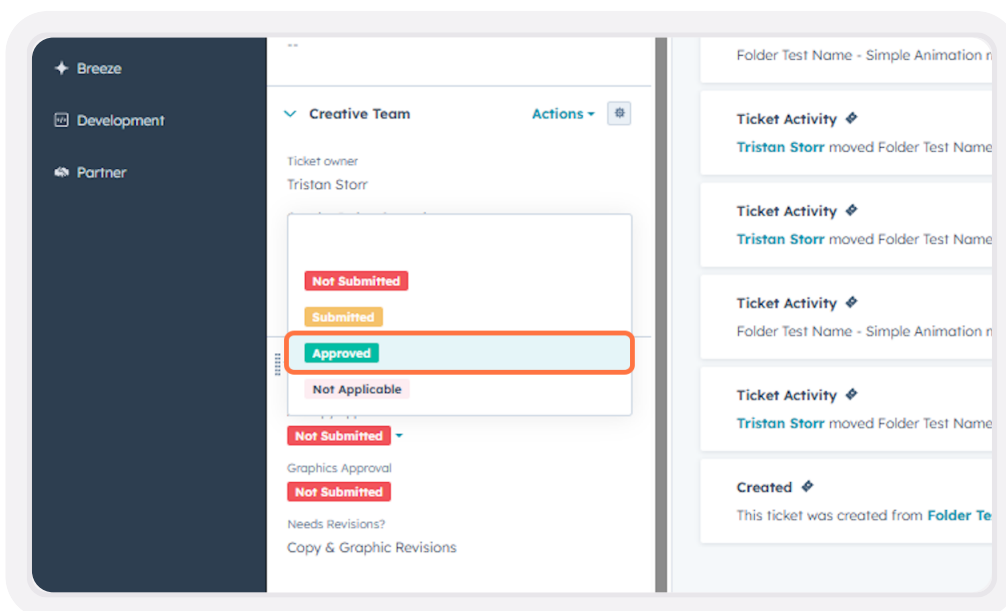
49 Approval Fields Move Back To "Not Submitted"

This action happens so that when the revisions are complete, the Copywriter/Designer can move the ticket back to pending by moving the Approval fields to approved.

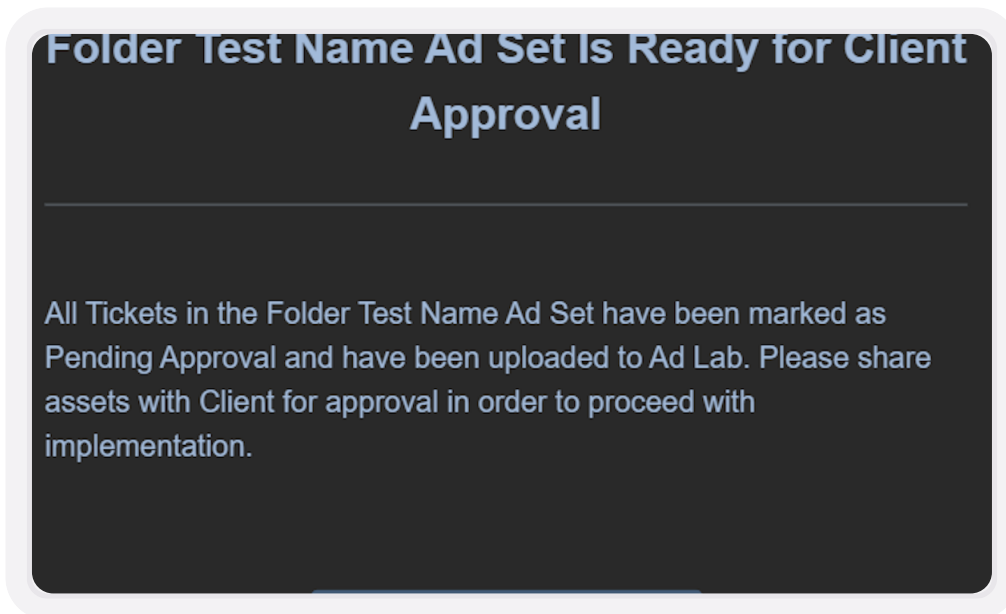


50 Copywriter/Designer Bypass QA When Revisions Are Finished

To expedite revisions, the Copywriter and Designer can move the Approval field directly to "Approved" once their revisions are implemented. Best practice is to notate changes made using note activities.

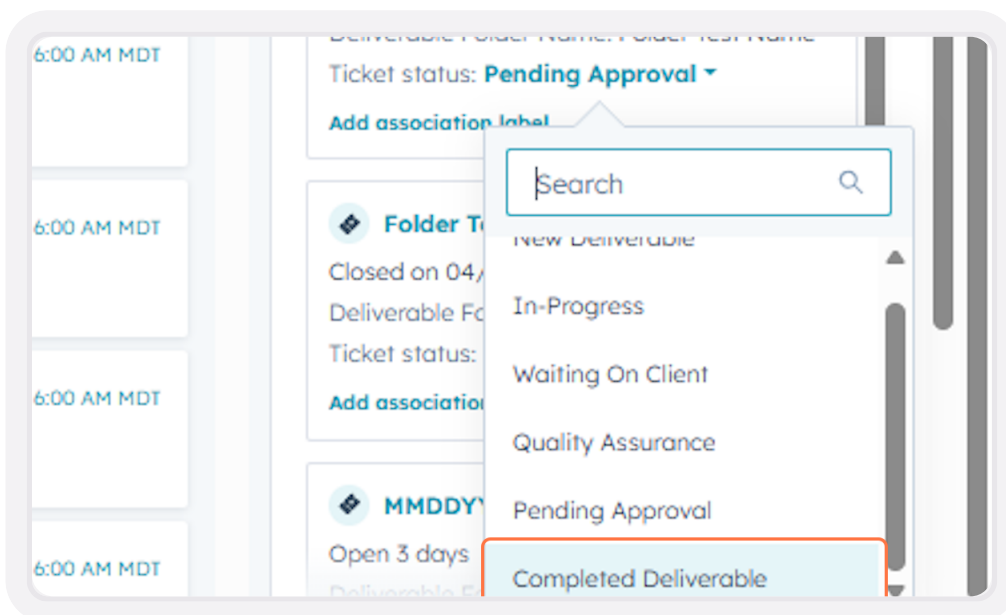


- 51 Once All Elements Reach "Approved" Again, The Same "Ready For Client Approval" Email Notification Will Be Sent To AM



- 52 IF Further Revisions Are Need On The Deliverable, Repeat This Process Above

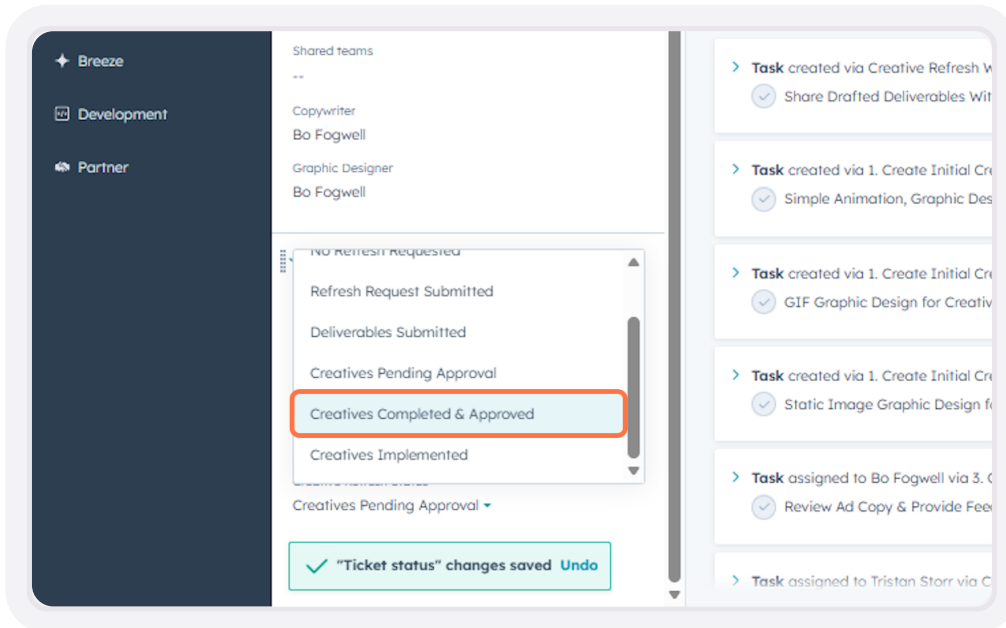
- 53 IF Revisions Are Approved, Move Ticket Status From Pending Approval To Completed Deliverable



54

WHEN All Deliverables Are Completed & Approved, The AM Is Responsible For Moving Creative Refresh Status To "Creatives Completed & Approved"

It is important that the AM take this action as they are the only person who knows when the client no longer has any feedback in need of revisions and implementation can continue.

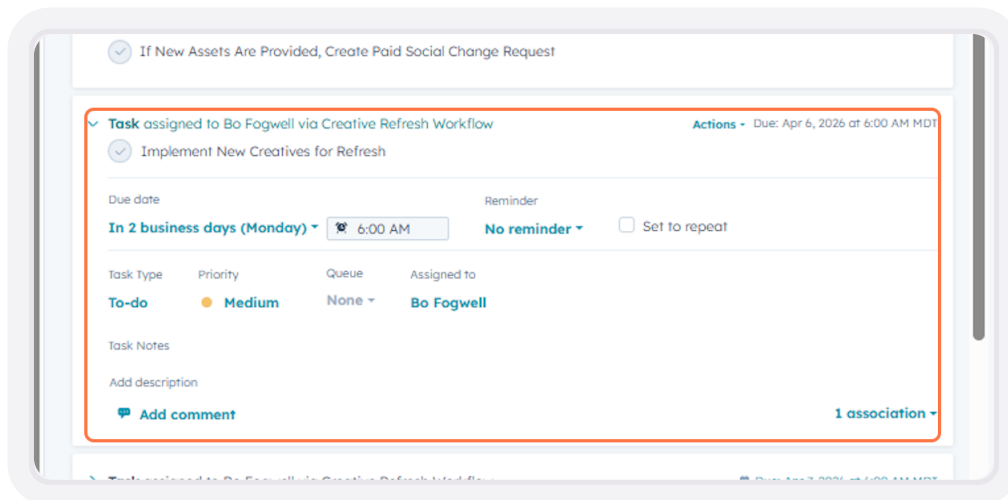


{ Implementation & Closing Creative Refresh Proces...

4 Steps

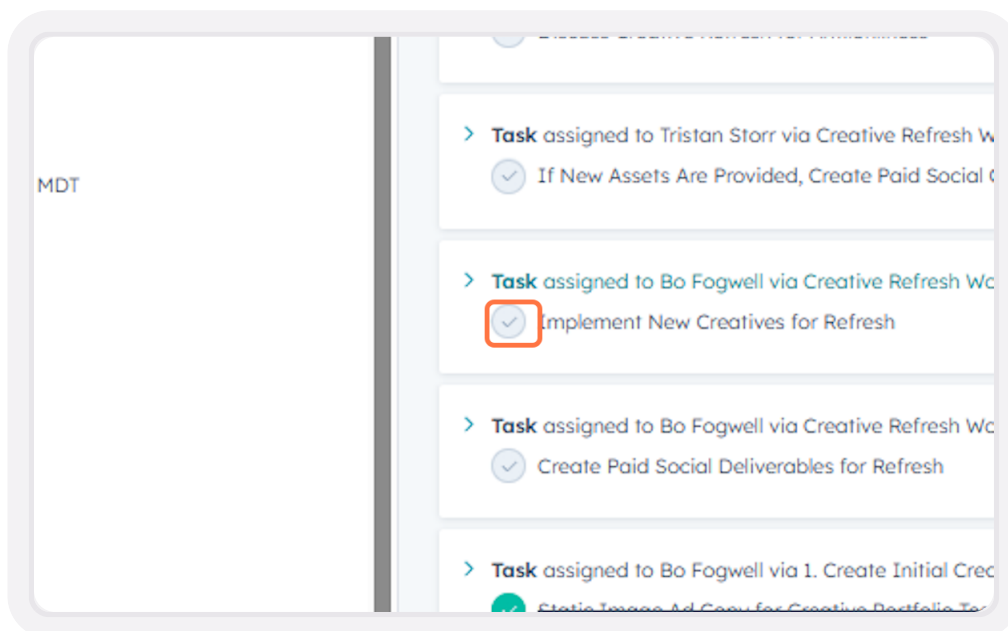
55 SAS Is Served A New Task for Implementing Creatives

This task is triggered when the AM moves the Creative Refresh Status to "Creatives Completed & Approved". The SAS should pull the assets from the Deliverable tickets they submitted and implement them in Meta.



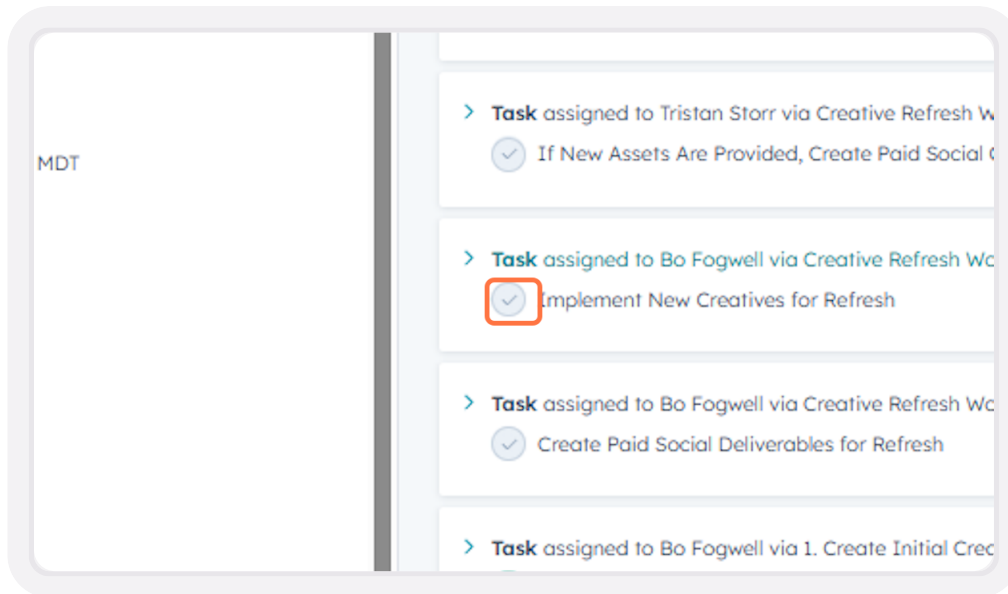
56 SAS Marks Their Implementation Task As Completed

It is very important that the SAS mark this task as completed. Doing so will automatically move the Creative Refresh status forward to "Creatives Implemented"



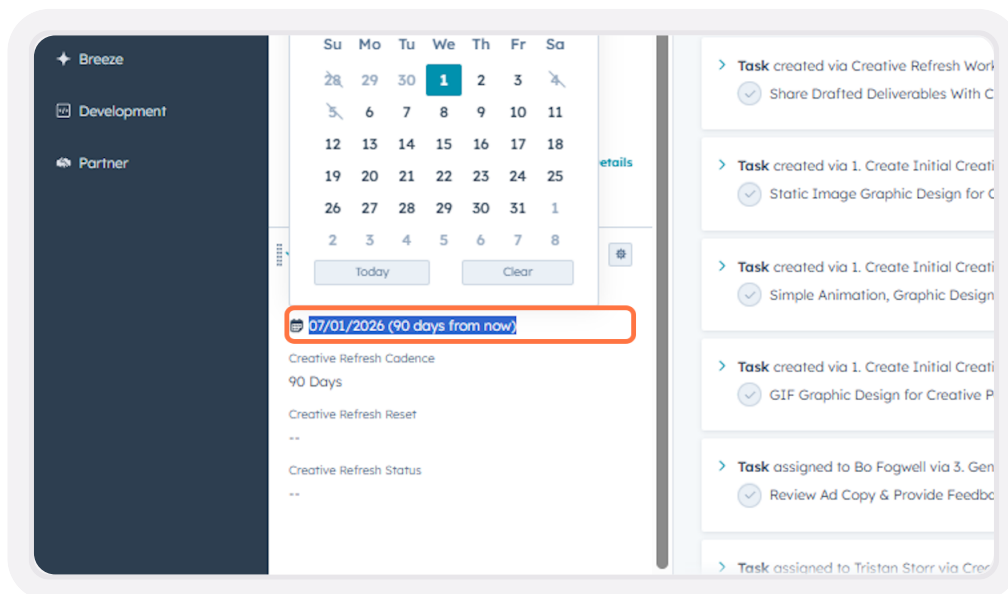
57 SAS Marks Their Implementation Task As Completed

It is very important that the SAS mark this task as completed. Doing so will automatically move the Creative Refresh status forward to "Creatives Implemented"



58 Creative Refresh Date Will Recalculate Based On Refresh Cadence

Once the portfolio hits "Creatives Implemented", it kicks off a workflow to reschedule the next Creative Refresh Date for whatever cadence is selected in the Creative Refresh Cadence property. The entire creative refresh process will then repeat as we approach that date.



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