Value-First Call

Call in HubSpot

How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

Each new Call holds one conversation and its notes, linked to the people in it.

We use Call as HubSpot ships it. Today it holds Chris Carolan's conversations with an AI member of our team, logged from ChatGPT. Older Calls hold recorded meetings.

Call or meeting?

> "I've always had a really hard time on what's a call, what's a meeting."



Casey Hawkins, Another Orange Morning, 23 June 2026

Try it in your portal

Log calls from ChatGPT. Connect HubSpot's ChatGPT connector, then ask it to log a call. Set Write tools to Needs Approval in its tool settings. Profile icon › Settings › Apps › HubSpot › Connect. Any plan, with an OpenAI account.

Link everyone on the call. Add each person in the conversation, an AI member of our team included, so the call shows on each timeline. Contact record › Log call › Association with records › Log activity. All plans.

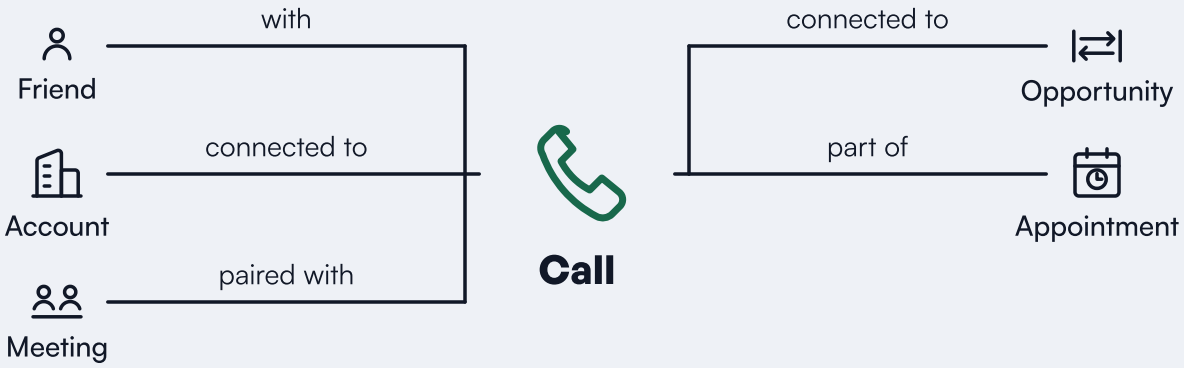
Whose value does it serve?

Value for the Customer

A conversation is kept on the records of the people who were in it.



What links to a Call?



Also connected, though not drawn: purchases, written records we keep, projects and more.

How does a Call change?

A Call does not move through stages. What changed is where a recording lives. Until early August 2026 a recorded meeting also arrived as a Call. Since 31 August 2026 HubSpot keeps a recorded meeting on the Meeting only.

What is a Call not?

Not where a show's recording lives. The episode and its video live on the episode's own record.

Not proof that value landed. A held conversation is context. Call numbers are never a measure of value.