Value-First Card

Our own custom object, not one of HubSpot's CRM cards

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

Each Card record is one card we make: it marks where someone stands with us, or carries one of our ideas.

A person with several roles has a card for each. Other cards carry one of our terms or are played in our game. Our AI members have cards too.

Try it in your portal

Add publishing stages. Make a pipeline from first idea to published and in use, as our cards do, and mark a stage Open when the work never ends. Settings › Data Management › Objects › Pipelines tab. Starter or above; Enterprise for custom objects.

Put the role on the link. Label the link to a show, organization or event with the role, such as Host or Guest, rather than typing it in a field. Data Model › Edit Data Model › Create association label. Professional or Enterprise.

Add a permanent ID. Create a text property that requires unique values, so no two records share an ID. Settings › Properties › Create property › Rules tab. Set it when you create the property. All plans.

What do we keep about a Card?

Beyond the usual record details and HubSpot history, we keep:

The words on the card. Its abilities, one flavor line and, for a term, what it means in our own words.

A public page, or none. Whether the card has a public page of its own.

Whose words they are. Who wrote the words and holds the authority to change them.

The finished card image. The card as an image to download. A person's likeness is read from their Friend record, not stored here.

Whose value does it serve?

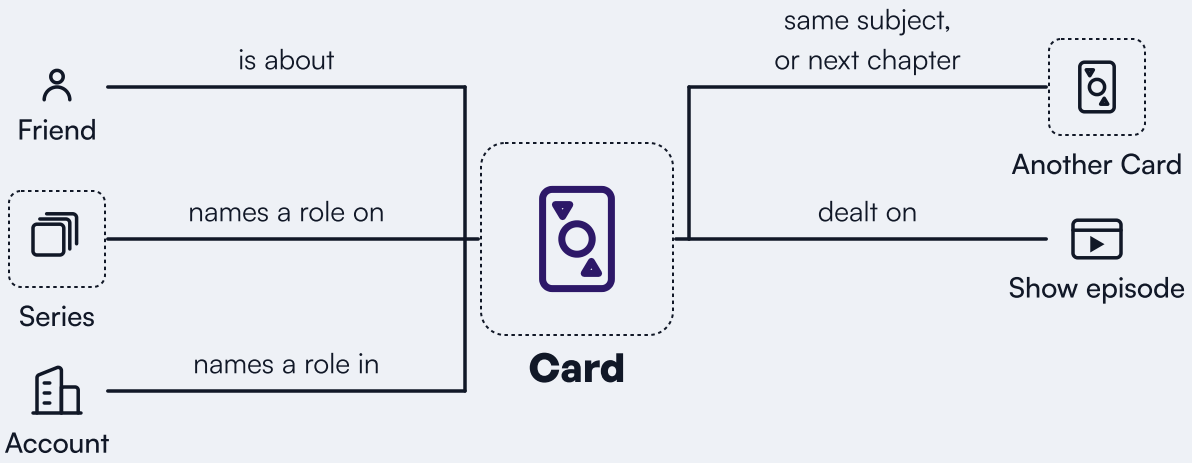
Value for the Community

That means everyone outside the transaction, the people who learn from our work without buying it. A card is handed to those who host, guest and build with us, and shown for anyone to learn from or play with.



What links to a Card?

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Dashed frames mark our own custom objects, which need an Enterprise subscription in HubSpot.

A Series is one of our shows. Another Card is a card of the same subject, or the next chapter of a story told across cards.

Also connected, though not drawn: events, where a card names a role such as Insider or Speaker.

How does a Card move with us?

Card Identified	Grounded	Copy & Art Ready	Rendered	Published	Delivered	In Play

A card is never finished: every stage is open, and a card in use is a living state, not an end. This is a publishing motion, set up like the one our episodes follow.

What is a Card not?

Not a person. The person is their Friend record. A card is about them, and one person can have many.

Not an episode. A guest's card names the show. The episode is where it happened.

Not one card whose role changes. Each role is its own card.

Not money. A card carries no amount and books no money.