Value-First Course

Course in HubSpot

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

Every structured learning pathway we keep has one Course record.

That means a free beginner course, live bootcamps and workshops, an on-demand certification course or a multi-week program, each shared by everyone who takes it.

Why not build your own?

> "You don't need custom objects right out of the gate … courses … extra objects that you can rename."

Chris Carolan, Hubsessed Office Hours: Loop Marketing and AEO, 6 October 2026

Try it in your portal

Turn on Courses. Use HubSpot's own object before you build a custom one: one record per course, shared by all who take it. More › Data Management › Data Model › Manage tab › Activate object. All plans; Super Admin.

Label who teaches. Label the link between a course and a contact, such as "Instructor" and "took part", instead of adding progress fields. Data Model › Edit Data Model › Create association label. Professional or Enterprise.

Add a level. Make a dropdown on Courses with your own levels (ours run Beginner to Expert). Settings › Properties › Course properties › Create property, field type Dropdown select.

What do we keep about a Course?

Beyond HubSpot's own course fields, we keep:

Its level. How much experience it assumes, from Beginner to Expert.

Its kind. What kind of course it is, such as a bootcamp.

A certificate. Whether finishing it earns a certificate.

When it runs. Its start and end, and the length worked out from them.

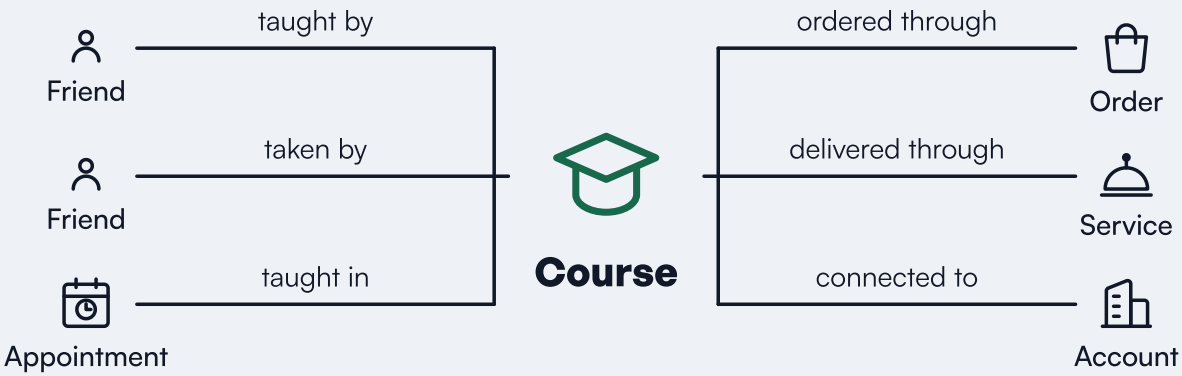
Whose value does it serve?

Value for the Customer

That means the people who take a course. They are the ones better off when it goes well, so the record serves them.



What links to a Course?



Also connected, though not drawn: projects, marketing events and emails.

How does a Course change?

A Course does not move through stages of ours. HubSpot gives it a default pair, Open and Closed, but we have written no meaning for either, so we use neither to say where a course is.

What is a Course not?

Not one team's journey. A Course is the pathway on the shelf. One client team's time through it is a Service, linked to the course.

Not the purchase. Access to a course, paid or free, is an Order of its own, linked to it. The course carries no price.

Not a session. One Course is the whole pathway. Each live session is an Appointment of its own, linked to the course.

Not one person's record. One Course is shared by everyone who takes it. Who teaches it and who took part are labelled links to Friends.