# Value-First Deliverable

Our own custom object in HubSpot

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

A Deliverable record holds one thing we promised to hand over, and its path until it is received.

That covers a plan, a website page, an audit, a set of coaching sessions or a video, for a client, a partner, a community member or our own team.

## Why a Deliverable object?

> "Imagine three deliverables … One for training, one for installation, one for warranty activation …"
>
> Chris Carolan, Hubsessed Office Hours - HubSpot Super Admin, 9 October 2026

## Try it in your portal

**Give each kind a pipeline.** Keep every kind of handover on one object, each kind on its own pipeline, as we do. Settings › Data Management › Objects › Pipelines tab › Create pipeline. Starter or above; Enterprise for custom objects.

**Make Delivered mean received.** Make Delivered require a received date, so no record moves there by hand without it. Settings › Data Management › Objects › Pipelines tab › Conditional logic rules › Add rule › Add property › Required. Enterprise for custom objects.

**Keep the first promise.** Beside the due date, keep a date for what you first promised. The due date can move; the promise stays. Settings › Properties › pick the object › Create property, field type Date picker.

## What do we keep about a Deliverable?

Beyond its name, kind and description, we keep:

**Three dates.** The date first promised, the due date and the date received. The first promise stays when the due date moves.

**What counts as done.** The conditions the person it is for agrees will mean it was delivered.

**Where it stands.** Its status and next step, written for the person it is for, who sees it in the client workspace we share.

**Weekly session packages.** The day, time, time zone, length of each session and the weeks off that were agreed.

## Whose value does it serve?

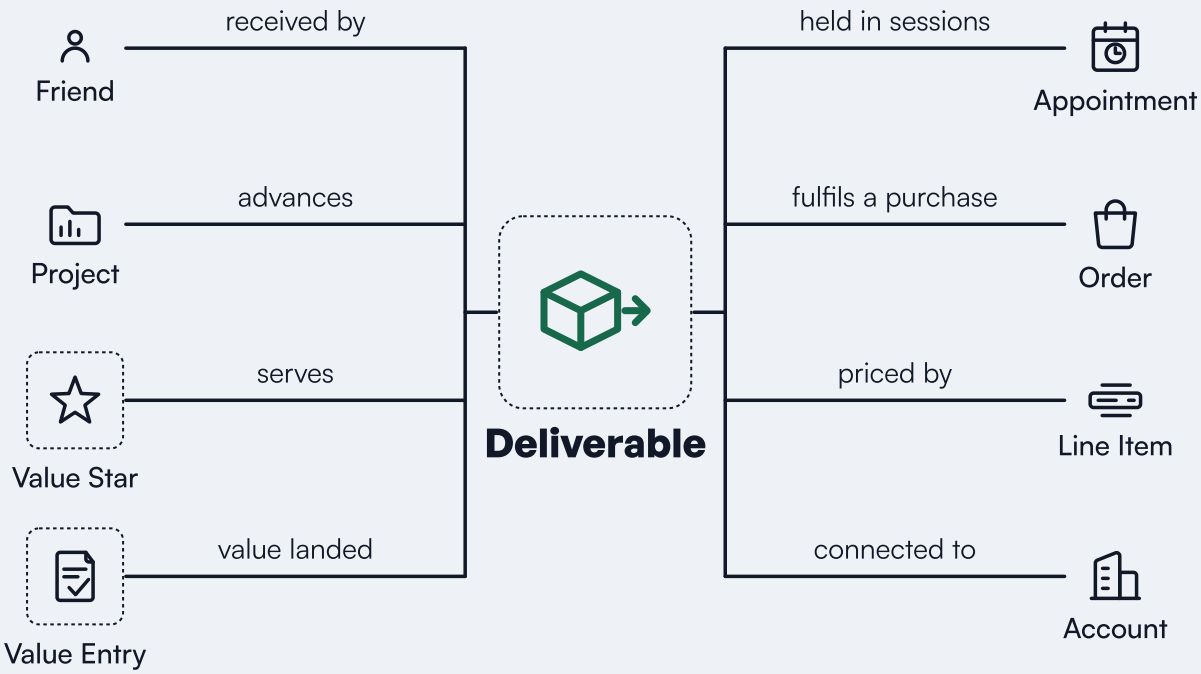
### Value for the Customer

That means the person it is handed to. A Deliverable is done only when they confirm they received it; a colleague on our own team counts as a customer too. Whether it created value is recorded separately.



# What links to a Deliverable?

**Value-First Deliverable**
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Dashed frames mark our own custom objects, which need an Enterprise subscription in HubSpot.

A Value Entry is a recorded moment where value actually landed; a Value Star is a business goal or initiative.

Also connected, though not drawn: Opportunities, tasks, tickets, services, notes and other Deliverables.

## How does a Deliverable move with us?

**Strategic Plans** · 1 of 27 pipelines shown

| | | | |
|---|---|---|---|
| Requested | Requirements Gathered | Scope Accepted | First Draft Completed |
| First Draft Reviewed | Final Draft Completed | Walked Through | Delivered |

Each kind we hand over has its own pipeline. Every pipeline has a Delivered stage: the person it is for confirmed they received it. On Hold and Dropped sit beside the making steps. Value is recorded separately, in a Value Entry.