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?

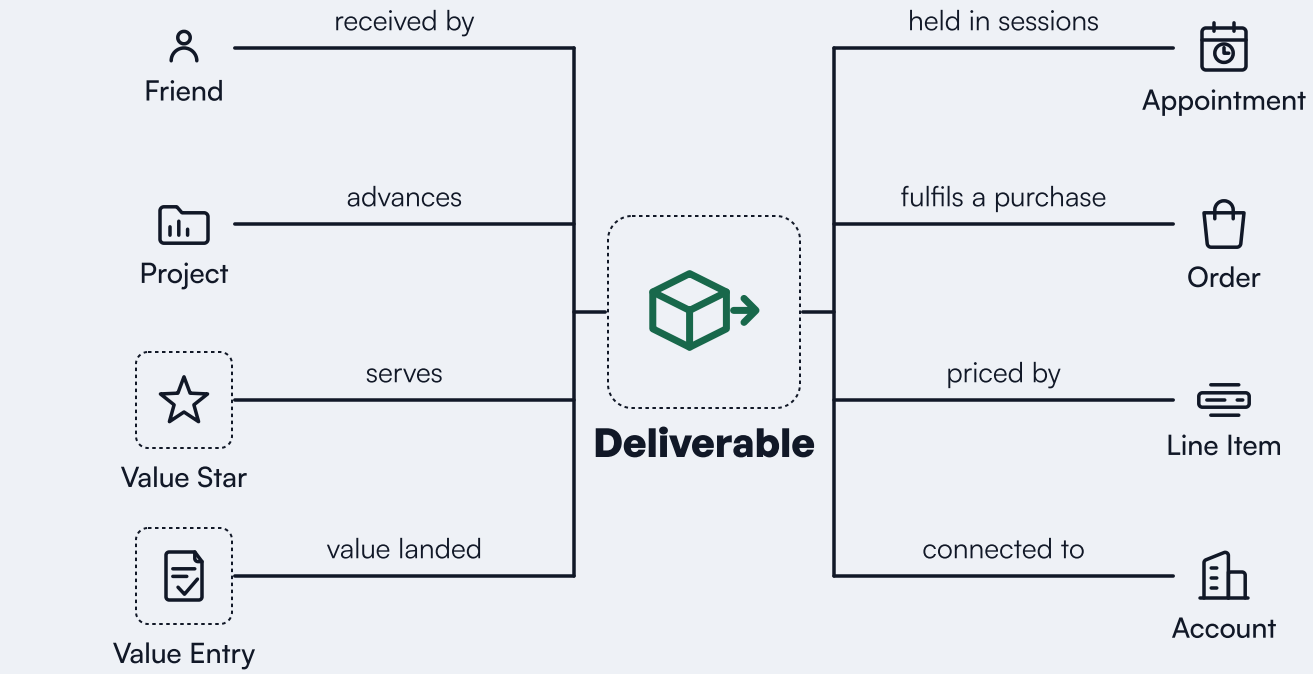
Value for the Customer

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.