Value-First Event

Our own custom object, now retired

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

An Event record held one session from our workshop catalog: what it taught, who it was for, who taught it.

Each record was one session, such as a workshop, roundtable or keynote. In May 2026 we retired the object and moved its 74 workshops to HubSpot's marketing events.

Try it in your portal

Try marketing events first. Before building a workshop object, use marketing events: once people arrive by import, workflow or app, HubSpot counts who registered, canceled and attended. Marketing › Events › Create marketing event. Any plan.

Say who each session is for. Add a dropdown to your marketing events listing the stages people move through with you, plus General. Settings › Properties › choose the object › Create property, field type Dropdown select.

Share one subject list. Give your marketing events and your other objects the same subject dropdown, as our workshops and shows share ten subjects. Settings › Properties › choose each object › Create property, Dropdown select.

What did we keep about an Event?

Beyond HubSpot's own fields, an Event record held:

Its subject. One of ten subjects, the same ten our shows use.

Who it was for. The stage of readiness it was meant for, and how deep it went: general, technical or strategic.

Format and access. A roundtable, workshop, keynote, interview, commentary or bootcamp; open to the public or to members.

Its teacher. Linked to the teacher's contact record, with key points, price and start time.

Whose value does it serve?

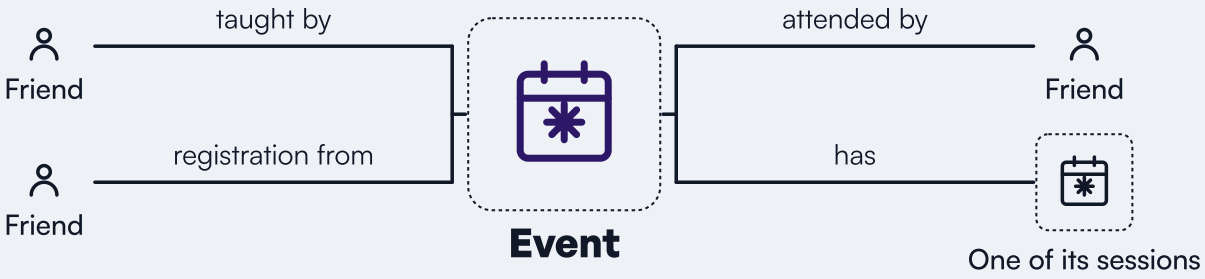
Value for the Community

Value for the Community is everyone outside the transaction: the field, the people who learn from the work without buying it. Each session said what it taught and who it was for.



Checked against our HubSpot portal and our written method on 9 November 2026

What links to an Event?



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

Only the teacher link is filled on our records; the others went unused. “One of its sessions” is another Event, shown dashed.

Also connected, never used: our own investment and deliverable objects, line items, tasks, and HubSpot’s notes, calls, emails and meetings.

How does an Event change?

An Event record did not move through stages. Its Stage property said who a session was for, not where the session stood in any process.

What is an Event not?

Not HubSpot’s marketing event. That is where our workshops live now.

Not a record of who came. It was built to hold registration and attendance, and no record ever did.

Not an Appointment. An Appointment holds a gathering’s time; an Event held a session in the catalog.