Value-First Friend

Contact in HubSpot

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



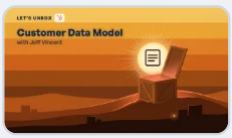
Chris Carolan Jeff Vincent Nectar Lattice

Every individual we have a relationship with has a Friend record, wherever they are on their path with us.

That means someone on a client's team, a partner, a contributor, someone who follows our shows, or one of the AI members of our team.

Why "Friend"?

> "In this portal, I renamed contacts to friends … I need a place for the AI guys … friends it is."



Chris Carolan, Let's Unbox A HubSpot Customer Data Model with Jeff Vincent, 27 June 2025

Try it in your portal

Add an entry stage. Make a second dropdown with the same stages as your current-stage field (ours is Value Path Stage), to see where someone first came in and where they are now. Settings › Properties › Create property, field type Dropdown select.

Add stages after the sale. Rename Lifecycle Stage's stages and add your own, as we add Adopter and Advocate, so lists and reports follow the sale. Settings › Data Management › Objects › Contacts › Lifecycle Stage tab. Super Admin only.

Label an introduction. Label the link from the introducer to the introduced person's Interest, such as "made the introduction for". Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

What do we keep about a Friend?

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

Their part in our shows. Whether they host, co-host, guest or produce, and the address of their public profile.

Illustrated likeness. Whether an illustrated likeness of them may appear in public.

Workspace sign-in. Their sign-in access to the client workspaces we share with them.

Complexity Traps. The ones they have named, of 12 industrial-age patterns that create friction and block natural value flow.

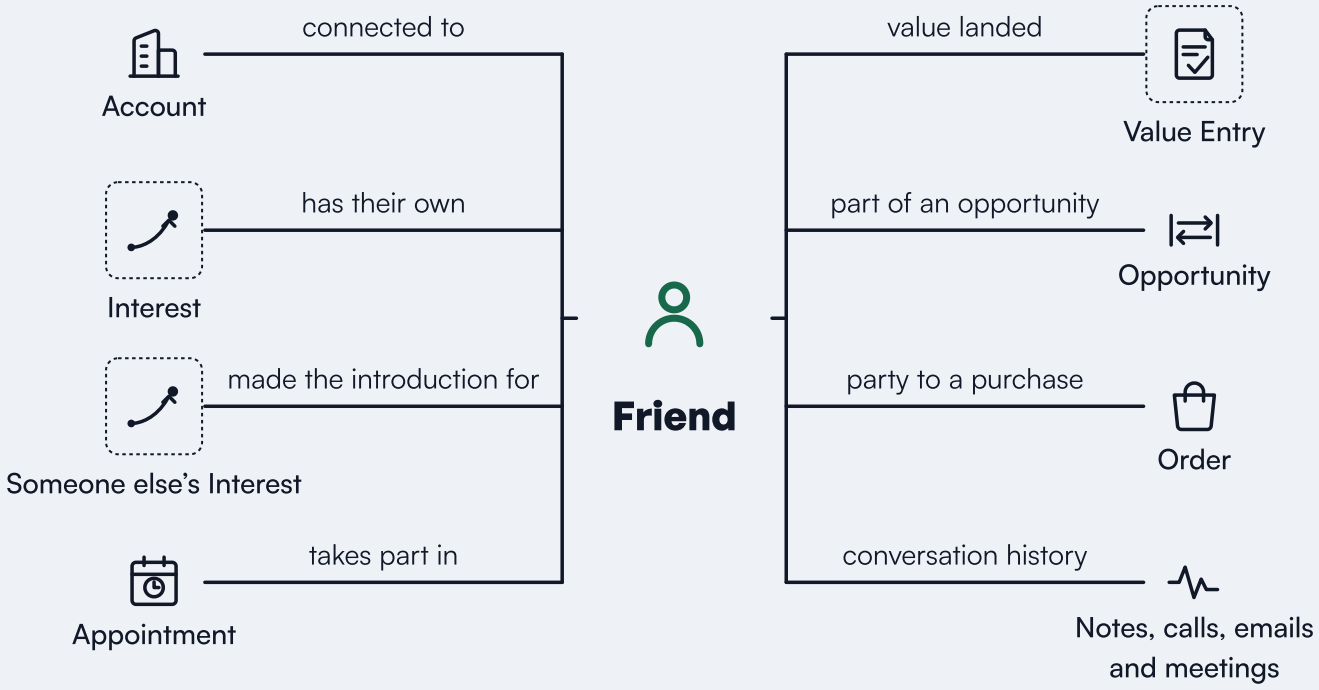
Whose value does it serve?

Value for the Customer

That means the people and organizations we work with. For each individual, the record asks one plain question: "is everything we know to be true about this person here?"



What links to a Friend?



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

An Interest is a relationship you recognize and develop; a Value Entry is a recorded moment where value actually landed.

Also connected, though not drawn: show episodes, written records we keep, projects, services, tasks and more.

How does a Friend move with us?

Path TO Value · Discovery & Evaluation

Audience	Researcher	Hand Raiser	Buyer
"I am learning"	"I am researching"	"I need help"	"I am buying"

The shift comes at the moment of purchase or commitment.

Path OF Value · Creation & Multiplication

Value Creator	Adopter	Advocate	Champion
"I must create value"	"I realize your value"	"I tell others about you"	"I am a raving fan"

People move by their own readiness: they can skip stages, revisit them or go at their own pace. Our Value Path field is the authority. HubSpot's Lifecycle Stage carries the same names for HubSpot's own reports and lists, and adds four stages outside the Path: Partner, Subscriber, Other and Past Client.