Value-First Interest

Our own custom object in HubSpot

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

Each Interest follows one journey a person is on toward more of our work, and belongs to that person.

Twelve people at one company are twelve Interests but a single Opportunity. An Opportunity comes only when a person raises their hand.

Why "Interest"?

> "You can be interested in something, but have no need for a call or no need for next steps."



Chris Carolan, Another Orange Morning, 3 November 2026

Try it in your portal

One record per journey. Make a custom object for journeys (ours is Interest) and connect each record to the person, so one person can have several. Data Model › Edit Data Model › + beside All objects › Custom object. Enterprise.

Name stages for what you see. Give that object a pipeline whose stages describe what you observe, and name the last for the fit, not the person (ours is No Fit). Settings › Data Management › Objects › Pipelines tab. Enterprise.

Mark teaching examples. Add a dropdown with Lived and Illustrative, so an example never counts as a real relationship. Settings › Properties › Create property, field type Dropdown select. All plans.

What do we keep about an Interest?

Beyond the usual name, notes and HubSpot history, we keep:

Kind, source and start. What kind of journey it is, where it began and the day it began.

How it showed up. Through our media, our community, an assessment or directly. More than one can apply.

Readiness signals. The signals we have noticed, written out in words, and who or what noticed them.

Complexity Traps. The ones in their pattern, of 12 industrial-age patterns that create friction and block natural value flow.

Whose value does it serve?

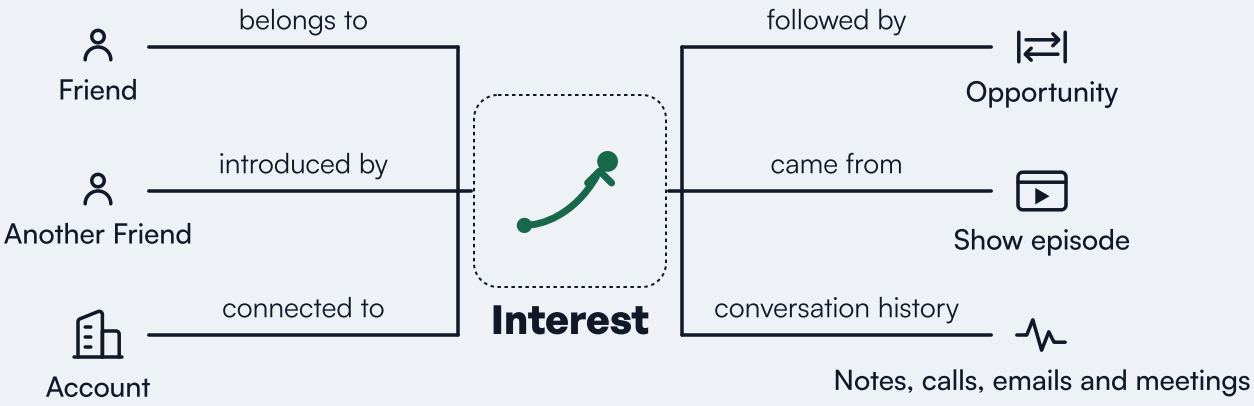
Value for the Customer

That means the people and organizations we work with. Each Interest is held for the person on the journey, so everyone who serves them sees where they are, read as movement toward value.



What links to an Interest?

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

Also connected, though not drawn: projects, tasks and more.

How does an Interest move with us?

Interest Pipeline · 1 of 4 pipelines shown

Interest Exists	Intent Emerging	Intent Validated	Readiness Indicated	Engaged Signal	No Fit

People move by their own readiness: we recognize it and never push it. Our method creates an Opportunity only at Engaged Signal, when they raise their hand, and the Opportunity is its own record. The last stage, No Fit, is a fact about the fit, never a verdict on the person.