Value-First Investment

Our own custom object in HubSpot

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

Each Investment record holds one commitment of money going out: what we committed to spend, to whom and why.

That means the software and services we pay for, and the people we pay to deliver work with us. A client's purchase from us is a different record, an Order.

Why "Investment"?

> "Maybe we should just call it investment in the systems, right?"
>
> Chris Carolan, a call with HubSpot staff, 12 June 2026

Try it in your portal

Give spending a record. Create a custom object for money you commit to spend (ours is Investment), beside the purchases coming in. Data Management › Data Model › Edit data model › + › Custom object. Needs Enterprise.

Add stages past Paid. Give that object a pipeline with Approved before Paid and Settled after it, for when the books are reconciled. Settings › Data Management › Objects › your object › Pipelines tab. Needs Enterprise.

Link a payment to its order. When you pay for a client's work, link that record to the client's Order, to see what it cost. Connect the two in Data Model › Edit Data Model, then +Add on the record. Enterprise for custom objects.

What do we keep about an Investment?

Beyond the amount and the date, we keep:

What kind of spend. Software, Services, Compensation or Infrastructure.

Who is paid. The vendor or the person, by name.

How often it recurs. One-time, monthly, quarterly or annual.

Tax details for paying people. The tax year, and whether the payment is reportable on the US 1099 contractor form.

Whose value does it serve?

Value for the Company

That means our own organization: its people, its capability, its ability to keep going. The record shows the money we commit to spend beside the purchases coming in, while the books stay in our accounting system.



What links to an Investment?



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

Also set up to connect, though not drawn:
Opportunities, invoices, subscriptions, tasks, notes and more.

How does an Investment move with us?

Open	Approved	Paid	Settled	Cancelled
Recorded, waiting for review	The commitment is firm	The payment has gone out	Reconciled in the books	Closed without going ahead

Every pipeline uses these five stages. They show the design: a spend is set as a commitment before the payment.

What is an Investment not?

Not a client's spending with us. That purchase is held on an Order, an invoice and a payment.

Not anything called an investment. The everyday word alone does not make something an Investment record.

Not the books. Our accounting system keeps the books. An Investment holds the commitment and its trail.