Value-First Product

Product in HubSpot

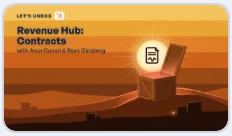
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

A Product record holds one thing we offer, described before anyone has asked for it.

That means an offer someone can commit to, such as a workshop or a coaching engagement.

Where does it start?

> "...that always starts at your product library. So how clear is your product library?"



Ryan Ginsberg, Unboxing HubSpot Revenue Hub: Contracts, 3 September 2026

Try it in your portal

Say who it is for. Add two text properties to your products: who it suits, and who should choose something else. Settings › Properties › Product properties › Create property, field type Single-line text. All plans.

Name what a sale makes. Add a dropdown of the work you deliver (ours includes consulting and training), so whoever agrees to a sale sees what it obliges you to make. Same path, field type Dropdown select. All plans.

Switch a product off. Deactivate it rather than delete it: it can't go on new Opportunities, quotes or subscriptions, and stays in reporting. CRM › Products, open the product, Actions › Deactivate. All plans.

What do we keep about a Product?

Beyond HubSpot's usual name, price and billing details, we keep:

Kind of offering. Workshop, scoping, implementation, coaching, partnership, Office Hours seat or media subscription.

Whether it is open now. Available now, coming soon or by invitation.

How it is priced. For example one-time, monthly, annual or free.

What comes before and after. The products someone needs first, and the offering that naturally comes next.

Whose value does it serve?

Value in Context

That means the decision, and whoever has to make it. Someone outside decides whether an offer is for them; we decide what agreeing to it obliges us to make.



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

What links to a Product?



Quotes, subscriptions, invoices and orders connect through line items. A line item names its product; HubSpot defines no link between them.

How does a Product move with us?

A product does not move through stages. It is on offer or switched off, and it is added to one Opportunity after another. Some products carry a tag for the Value Path stages they serve; the tag describes the product and never moves it.

What is a Product not?

Not the thing someone bought. That is a line item on their Opportunity, quote or subscription. The product is the offering; the line item is one sale of it.

Not tied to a person. It has no link to a Friend. Who bought it sits on the Opportunity, quote, order or subscription.

Not the work delivered. What a client receives is held elsewhere. The product only says what a sale of it will produce.

Not only goods. HubSpot built its Product object for tangible items. Our library is mostly engagements.