Value-First Segment

Segment in HubSpot, once called a list

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

A Segment holds a group of records that belong together, by a rule or by someone's choice.

We use Segments as HubSpot ships them. An active one re-checks its rule, so records join and leave on their own; a static one changes only by hand.

Do segments matter?

> "If you get these [segments] right … that personalization, all that stuff, that's how it happens."



Chris Carolan, Another Orange Morning, 23 October 2026

Try it in your portal

Group by a linked stage. Make an active segment of records whose associated record (for us, a recorded moment of value) is at a given stage. CRM › Segments › Create segment › Manually › Add filter. Enterprise for custom objects.

Layer an active segment. Keep a chosen group as a static segment, then make an active segment from its members who now meet a new rule. Add filter › Memberships › Segment membership. All plans.

Check before you delete. Open a segment's Used in tab first. Deleting keeps its records, and you can restore it for 90 days. CRM › Segments › hover a segment › Details › Used in. All plans.

Whose value does it serve?

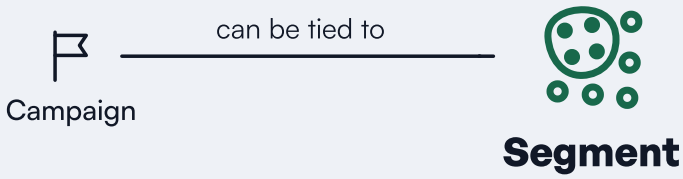
Value for the Customer

The Customer is the people and organizations we work with. Most of our segments group Friends, so a Friend's record shows their segments and since when. The reason is in each rule.



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

What links to a Segment?



HubSpot builds in a link from a Segment to a Campaign, and we tie none. What a Segment holds is membership, not a link.

How does a Segment change?

A Segment has no stages. An active one gains and loses records as they meet or stop meeting its rule. A static one changes only when someone adds or removes records. Deleting one keeps its records, and you can restore it for 90 days.

What is a Segment not?

Not a place records live. Each record stays on its own object. A Segment only says who belongs.

Not the reason they belong. A Friend's record shows their groups and since when. The reason is in the rule.

Not a status. A Segment named for a state is still only a grouping, never a fact about the person.