Value-First Series

Our own custom object in HubSpot

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

Each show or newsletter we publish has one Series record, and each episode or issue is linked to it.

The record keeps what is true of the show as a whole, so those details are kept once, not copied onto every episode.

What lives in HubSpot?

> "...all of the data related to this show and all the episodes ... is all in HubSpot..."



Chris Carolan, Another Orange Morning, 21 July 2026

Try it in your portal

Give each show a record. Make a custom object for your shows, then link each episode to its show, so the show's details live in one place. Data Model › Edit data model › + › Custom object. Enterprise; linking works on every plan.

Name the host on the link. Create a pair of labels between contacts and your show object (ours: "Host" and "Series Host Contact"), to segment by host. Data Model › Edit Data Model › Create association label. Professional or Enterprise; Super Admin only.

Track status in a dropdown. A show runs; it does not move to done. Use a Dropdown select property (ours: Planned, Active, Hiatus, Concluded). Settings › Properties › Create property. Every plan.

What do we keep about a Series?

Because it is our own object, we choose what it keeps:

The show's shape. Its format, such as solo, co-hosted or interview, and how often it runs, from daily to monthly.

Where it reaches people. LinkedIn Live, YouTube, Spotify or Apple Podcasts, and the address of its home page.

Its standing slot. The days, start time and time zone, length, live or recorded, and the date the slot is promised from.

Which way in it teaches. Whether it teaches the Five Core Beliefs values-down or architecture-up.

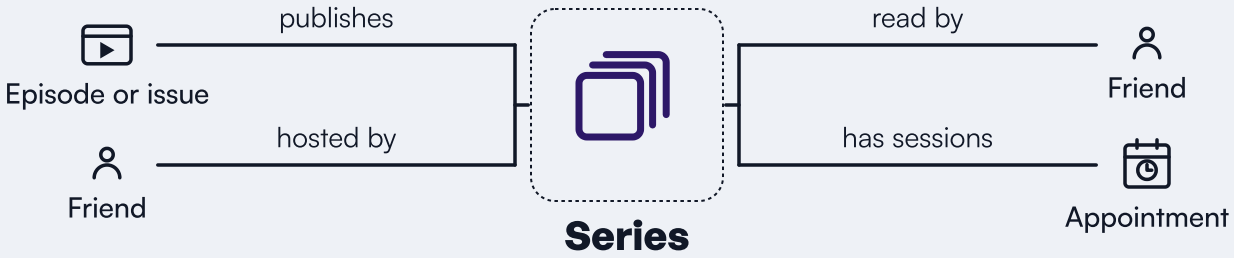
Whose value does it serve?

Value for the Community

That means the people outside the transaction, who learn from our work without buying it. A Series holds the shows and newsletters they follow, with their hosts and readers.



What links to a Series?



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

Also connected, though not drawn: cards from our card collections, Accounts and more.

How does a Series change?

Nothing moves through stages: a show runs, so it has no pipeline. Its status is a dropdown (Planned, Active, Hiatus or Concluded) that says whether the show is being published. A show can pause and come back; its slot can carry the date it returns.

What is a Series not?

Not an episode. Each episode or issue is its own record, linked to its show.

Not the show's content. What the show says is written in our content system.

Not a schedule entry. It keeps the standing slot; each working session is an Appointment.