Value-First Value Entry

Our own custom object in HubSpot

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

A Value Entry is one recorded moment where value actually landed for someone.

It counts as realized value only once it is confirmed by the one who received it. Whoever did the work never confirms it.

Why a Value Entry?

> "Do we have somewhere to put the information that they [the client] just really love what just happened?"
>
> Chris Carolan, Digging Back Into AI ROI, 2 September 2026

Try it in your portal

Keep their own words. Add a multi-line text property for what someone said about the value they got, word for word, never summarized. Settings › Properties › Create property, field type Multi-line text. All plans.

Name the kind of value. Add a dropdown of the kinds of value you deliver, such as time returned or risk removed, instead of a points field. Settings › Properties › Create property, field type Dropdown select. All plans.

Label who did what. Label a record's links to its people: received by, done by, confirmed by. Keep doer and confirmer different people. Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

What do we keep about a Value Entry?

HubSpot has no standard version, so these fields are ours. Among them:

The receiver's own words. Exactly as they wrote or said them, never summarized or smoothed.

The moment it cites. When the value landed, and a link to where it happened.

The kind of value. One of six kinds, such as time returned or risk removed. Never a score.

How sure the one who saw it is. Low, medium or high, with a line on why. Low is never penalized.

Whose value does it serve?

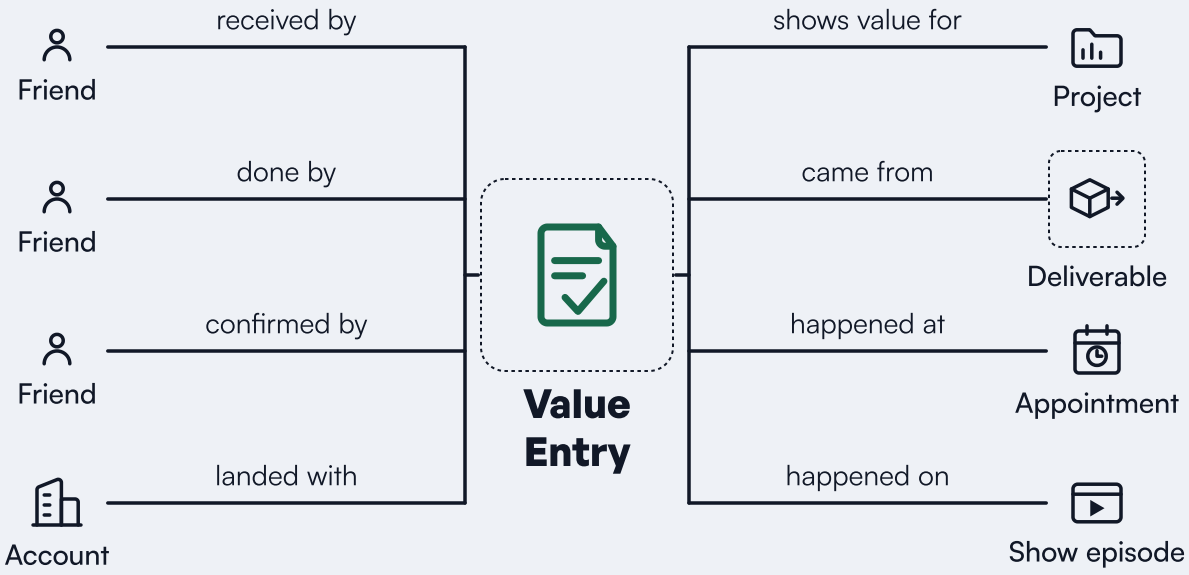
Value for the Customer

That means the people and organizations we serve. A Value Entry is theirs to confirm, never ours to declare, and it is written in their terms, not as a number.



What links to a Value Entry?

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

A Deliverable is the work that produced the value, when there is one.

Also connected, though not drawn: written records we keep, orders, quotes, notes and calls, and tasks.

How does a Value Entry move with us?

Witnessed
Someone saw it land and wrote it down

Shown
The claim is put in front of the person it is about

Confirmed
The one who received it says it landed

Settled
The month it landed in is closed out

Confirmed comes from the receiver, or for our own team their leader, saying it landed; never the one who did the work.

What is a Value Entry not?

Not a score. It names a kind of value, never a number to total or rank. No points or quota field exists on it.

Not a click or a page view. Those are signals, a different layer. A Value Entry records value that landed.

Not a money record. Orders, invoices and payments stay the financial record. Money follows the value and never decides it.

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