VALUE-FIRST TEAM

THE OBJECT SHEETS · COMPLETE EDITION

The Value-First Data Model

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

43 objects, two pages each.

43 SHEETS BY VALUE CORNERSTONE



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

Each sheet also lives on its own at **valuefirstteam.com/data-model** and **valuefirstos.com/data-model**

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43 object sheets, two pages each, grouped by the Value Cornerstone each one serves.

VALUE-FIRST TEAM

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A coloured dot after a name marks another Cornerstone the object also serves.

Value-First Friend

Contact in HubSpot

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



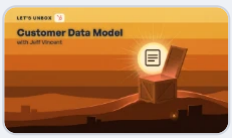
Chris Carolan Jeff Vincent Nectar Lattice

Every individual we have a relationship with has a Friend record, wherever they are on their path with us.

That means someone on a client's team, a partner, a contributor, someone who follows our shows, or one of the AI members of our team.

Why "Friend"?

> "In this portal, I renamed contacts to friends … I need a place for the AI guys … friends it is."



Chris Carolan, Let's Unbox A HubSpot Customer Data Model with Jeff Vincent, 27 June 2025

Try it in your portal

Add an entry stage. Make a second dropdown with the same stages as your current-stage field (ours is Value Path Stage), to see where someone first came in and where they are now. Settings › Properties › Create property, field type Dropdown select.

Add stages after the sale. Rename Lifecycle Stage's stages and add your own, as we add Adopter and Advocate, so lists and reports follow the sale. Settings › Data Management › Objects › Contacts › Lifecycle Stage tab. Super Admin only.

Label an introduction. Label the link from the introducer to the introduced person's Interest, such as "made the introduction for". Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

What do we keep about a Friend?

Beyond the usual contact details and HubSpot history, we keep:

Their part in our shows. Whether they host, co-host, guest or produce, and the address of their public profile.

Illustrated likeness. Whether an illustrated likeness of them may appear in public.

Workspace sign-in. Their sign-in access to the client workspaces we share with them.

Complexity Traps. The ones they have named, of 12 industrial-age patterns that create friction and block natural value flow.

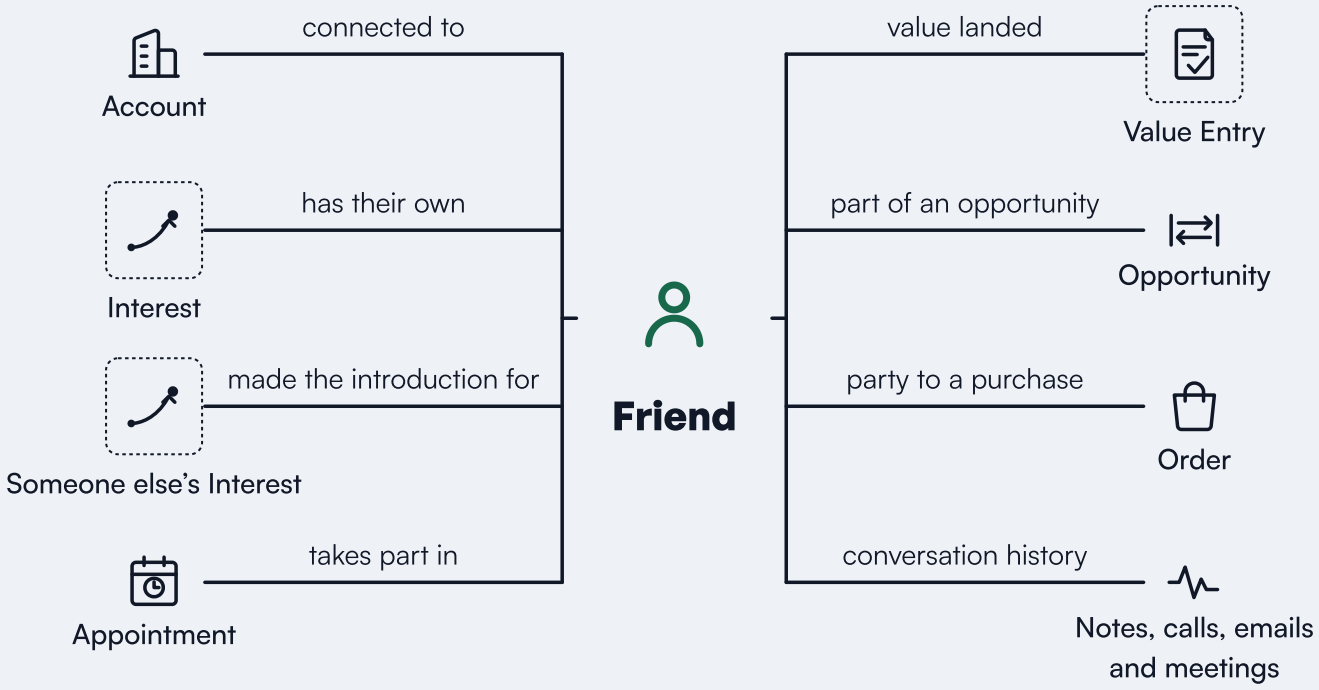
Whose value does it serve?

Value for the Customer

That means the people and organizations we work with. For each individual, the record asks one plain question: "is everything we know to be true about this person here?"



What links to a Friend?



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

An Interest is a relationship you recognize and develop; a Value Entry is a recorded moment where value actually landed.

Also connected, though not drawn: show episodes, written records we keep, projects, services, tasks and more.

How does a Friend move with us?

Path TO Value · Discovery & Evaluation

Audience	Researcher	Hand Raiser	Buyer
"I am learning"	"I am researching"	"I need help"	"I am buying"

The shift comes at the moment of purchase or commitment.

Path OF Value · Creation & Multiplication

Value Creator	Adopter	Advocate	Champion
"I must create value"	"I realize your value"	"I tell others about you"	"I am a raving fan"

People move by their own readiness: they can skip stages, revisit them or go at their own pace. Our Value Path field is the authority. HubSpot's Lifecycle Stage carries the same names for HubSpot's own reports and lists, and adds four stages outside the Path: Partner, Subscriber, Other and Past Client.

Value-First Interest

Our own custom object in HubSpot

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

Each Interest follows one journey a person is on toward more of our work, and belongs to that person.

Twelve people at one company are twelve Interests but a single Opportunity. An Opportunity comes only when a person raises their hand.

Why "Interest"?

> "You can be interested in something, but have no need for a call or no need for next steps."



Chris Carolan, Another Orange Morning, 3 November 2026

Try it in your portal

One record per journey. Make a custom object for journeys (ours is Interest) and connect each record to the person, so one person can have several. Data Model › Edit Data Model › + beside All objects › Custom object. Enterprise.

Name stages for what you see. Give that object a pipeline whose stages describe what you observe, and name the last for the fit, not the person (ours is No Fit). Settings › Data Management › Objects › Pipelines tab. Enterprise.

Mark teaching examples. Add a dropdown with Lived and Illustrative, so an example never counts as a real relationship. Settings › Properties › Create property, field type Dropdown select. All plans.

What do we keep about an Interest?

Beyond the usual name, notes and HubSpot history, we keep:

Kind, source and start. What kind of journey it is, where it began and the day it began.

How it showed up. Through our media, our community, an assessment or directly. More than one can apply.

Readiness signals. The signals we have noticed, written out in words, and who or what noticed them.

Complexity Traps. The ones in their pattern, of 12 industrial-age patterns that create friction and block natural value flow.

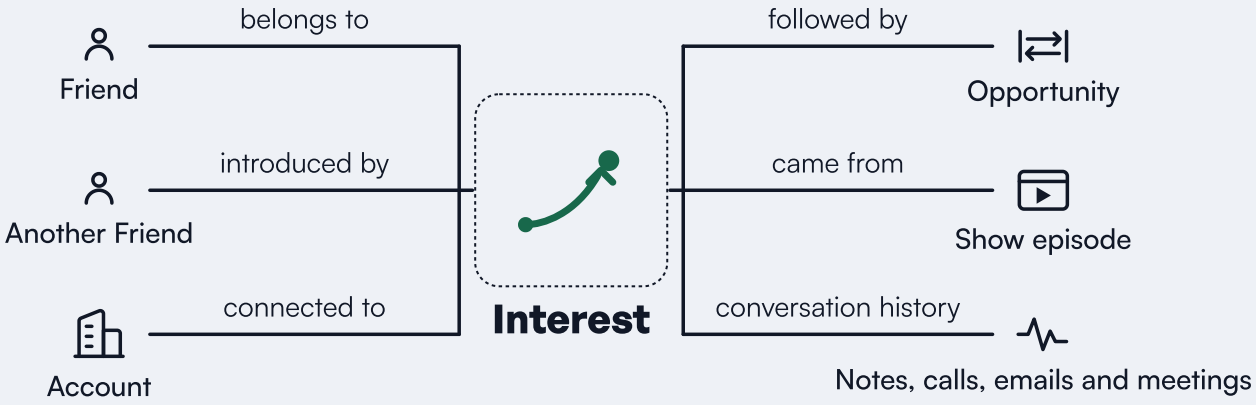
Whose value does it serve?

Value for the Customer

That means the people and organizations we work with. Each Interest is held for the person on the journey, so everyone who serves them sees where they are, read as movement toward value.



What links to an Interest?



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

Also connected, though not drawn: projects, tasks and more.

How does an Interest move with us?

Interest Pipeline · 1 of 4 pipelines shown

Interest Exists	Intent Emerging	Intent Validated	Readiness Indicated	Engaged Signal	No Fit

People move by their own readiness: we recognize it and never push it. Our method creates an Opportunity only at Engaged Signal, when they raise their hand, and the Opportunity is its own record. The last stage, No Fit, is a fact about the fit, never a verdict on the person.

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?

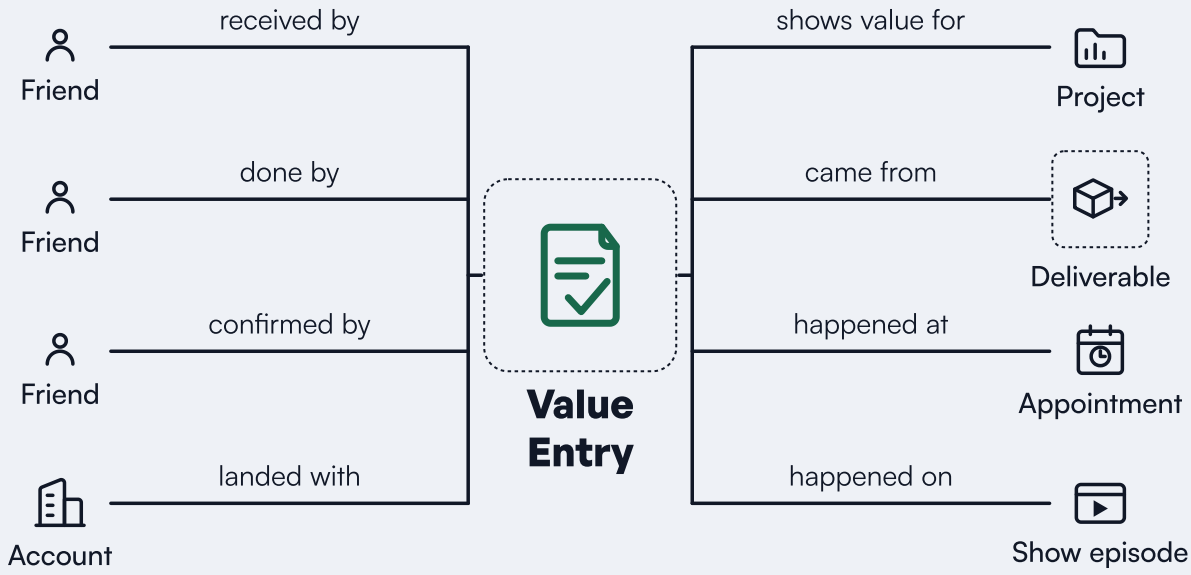
Value for the Customer

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?

Value-First Value Entry
Our own custom object in HubSpot



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	Shown	Confirmed	Settled
Someone saw it land and wrote it down	The claim is put in front of the person it is about	The one who received it says it landed	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.

Value-First Account

Company in HubSpot

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

Every organization we have a relationship with has an Account record, apart from the people in it.

That means a client, a sponsor of our shows, a partner organization, a former client, a vendor, or the organization a person we know works for.

What is an Account record?

> "One of the ways I describe a company record … is by pointing to their customers folder."



Chris Carolan, Another Orange Morning, 21 October 2026

Try it in your portal

Track where work stands. Add a dropdown for Active, Paused, Complete and Never started, and a date for when work began (the kickoff, not the sale). Settings › Properties › Company properties › Create property, field type Dropdown select or Date picker.

Mark records made for teaching. Add a dropdown with Lived and Illustrative, so a record made to teach never counts as real value. Settings › Properties › Company properties › Create property, field type Dropdown select.

Label who received the value. Label the link from a Value Entry to the Account that received it, such as "received value". Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

What do we keep about an Account?

Beyond the usual details and HubSpot history, we keep:

Their HubSpot setup. Which hubs and tiers they use, whether their portal is production or sandbox, and which ERP they run.

What the relationship is for. Their strategy and goals with us, the kind of work, how they decide, and what we think we can help with first.

How the work reached us. Who brought the work, who delivers it, and the route: with a partner, through an agency, directly or by project.

Show sponsorship. Whether they sponsor our shows, at which tier, and since when.

Whose value does it serve?

Value for the Customer

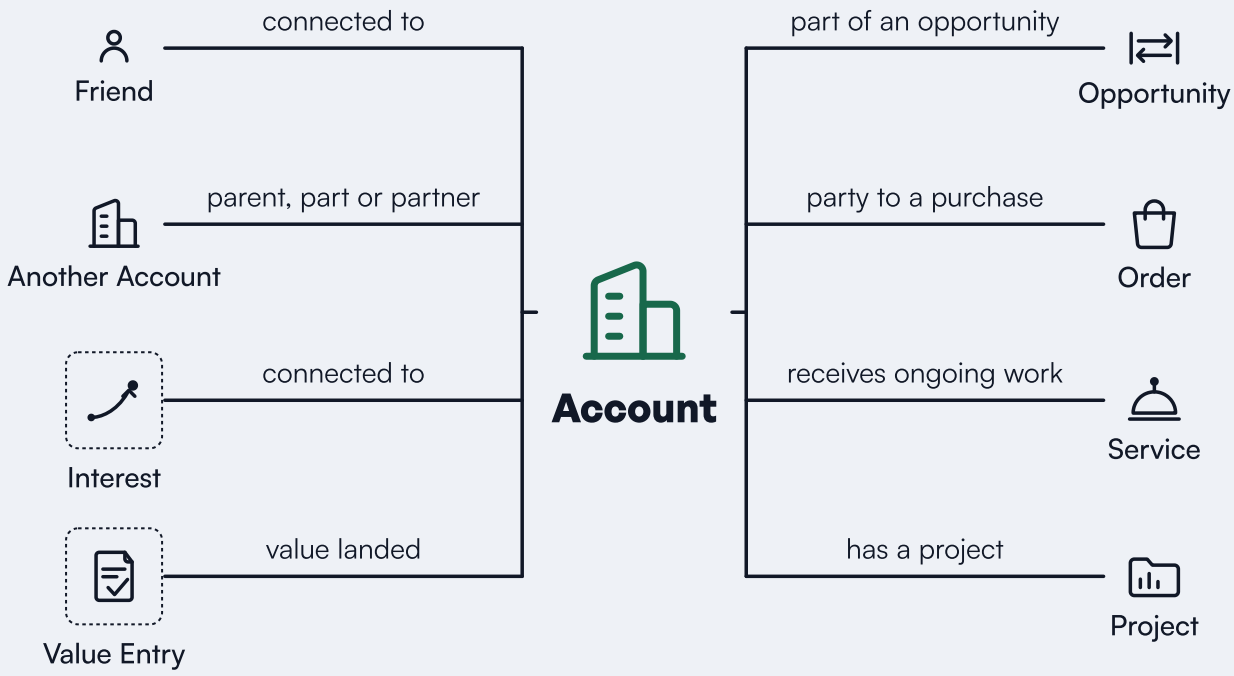
That means the people and organizations we work with. Facts about the Account stay on the Account, in the place our team already works.



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

What links to an Account?

Value-First Account
Company in HubSpot



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

An Interest is a relationship you recognize and develop; a Value Entry is a recorded moment where value actually landed.

Also connected, though not drawn: invoices, subscriptions, contracts, quotes, notes, calls, meetings, tickets, show episodes and more.

How does an Account move with us?

Path TO Value · Discovery & Evaluation

Audience	Researcher	Hand Raiser	Buyer
"I am learning"	"I am researching"	"I need help"	"I am buying"

The shift comes at the moment of purchase or commitment.

Path OF Value · Creation & Multiplication

Value Creator	Adopter	Advocate	Champion
"I must create value"	"I realize your value"	"I tell others about you"	"I am a raving fan"

An Account's stage is its own, never added up from its people's: a new hire can be a Researcher while the Account is an Adopter. Our Value Path field holds it; HubSpot's Lifecycle Stage carries the same names and adds four outside the Path: Partner, Subscriber, Other and Past Client.

Value-First Appointment

Appointment in HubSpot

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

One record for each time people come together: why it is happening, who takes part and what came out of it.

That covers coaching calls, working sessions, internal meetings, community meetups, partner sessions and the recording of our shows.

Why Appointments?

> "The gold happens on the calls usually. … I use appointment records … because there's pipelines."
>
> Chris Carolan, Launching A Value-First Summer: The Solstice Broadcast, 20 June 2026

Try it in your portal

Turn on Appointments. Give each gathering its own record, with a purpose and stages. Data Management › Data Model › Manage tab › Activate object. All plans; Super Admin.

One pipeline per kind. Give each kind of gathering a pipeline, its last stage named for what it produces (ours: "Clarity Delivered"). Settings › Data Management › Objects › Appointments › Pipelines. Renaming: every plan; a second pipeline: Starter or above.

Label each person's part. Label the link between a contact and an Appointment, such as Host, Invited and Present. Data Model › Edit Data Model › Create association label. Professional or Enterprise; Super Admin.

What do we keep about an Appointment?

Beyond HubSpot's name, times, owner and stage, we keep:

Why it is happening. Its purpose in one sentence, and an agenda of talking points, decisions needed and open questions.

What came out of it. Highlights, action items and the next step that emerged.

Who it is for. Internal only, us and a delivery partner, or shared with the client.

Their own words. What someone wrote when they booked or chose to share, kept exactly as typed, never as a rating.

Whose value does it serve?

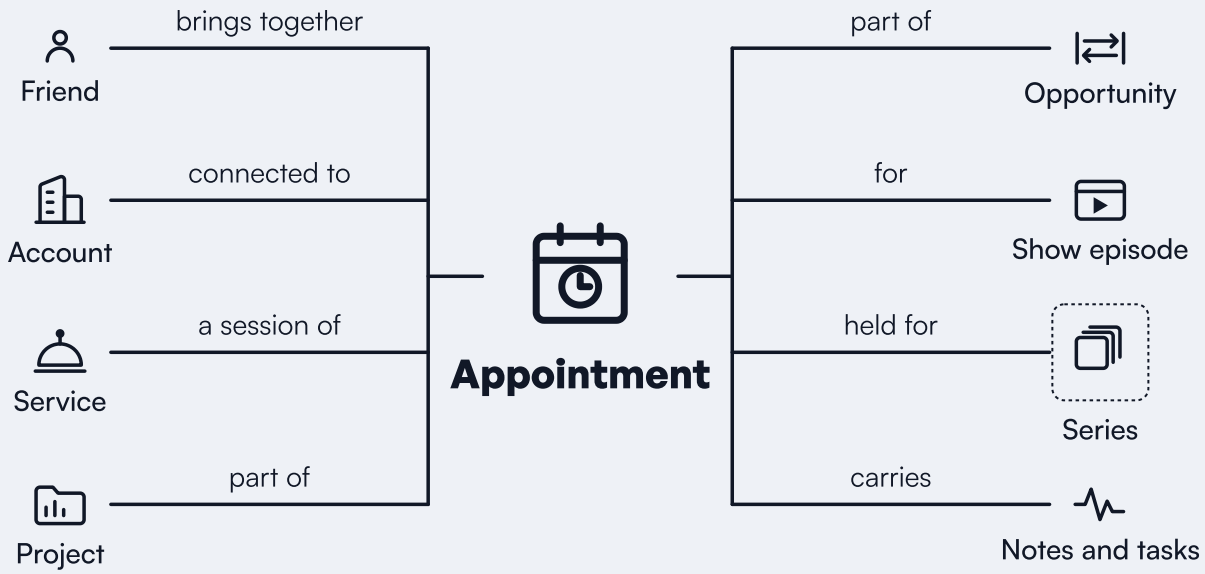
Value for the Customer · Value for the Company · Value for the Community

Each kind of gathering names whose value it serves: the people and organizations we work with, our own organization, or the world around us. We route each by who is better off when it goes well.



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

What links to an Appointment?



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

A Series is our record for each show or publication.

Also connected, though not drawn: requests, the calendar's meeting and call records, session packages, written records we keep and more.

How does an Appointment move with us?

Weekly Coaching · 1 of 16 pipelines shown

Scheduled	Context Ready	Coaching Session	Action Plan Set	Value Delivered

Most follow one shape: scheduled, prepared, held, written up, closed on what it produced. A closing stage means the follow-through was done, never that value landed: that counts once the one who received it confirms it.

Value-First Project

Project in HubSpot

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

A Project record holds one piece of work with an end, aligned to achieve one or more business goals.

Each goal it serves is a Value Star, and one Project can serve several. The work can be for a client, for our own team, or for our community.

Try it in your portal

Split work into pipelines. Ours for the five main kinds end in a closed Done stage, with On Hold and Stopped. Settings › Data Management › Objects › Projects › Pipelines › Create pipeline. Starter, Professional or Enterprise; a Super Admin turns Projects on first.

Write down what must be true. Add a property for the condition that must hold before a project moves on: something you can confirm, not a date. Settings › Properties › Project properties › Create property, field type Multi-line text. Available on every plan.

Label who is answerable. Make ownership a link, not a text field: label the link between projects and contacts, such as “Accountable owner”. Data Model › Edit Data Model › Create association label. Professional or Enterprise.

What do we keep about a Project?

Beyond HubSpot’s usual project details, we keep:

Unplanned value. A running log of opportunities, capabilities or insights the work turned up that nobody planned for.

The outcome it delivers. The business outcome the work exists to deliver.

Real work or an example. Whether the record is real work or a teaching example. An example can never be the source of a value claim.

A client’s own goals. On a coaching engagement, the client’s own goal for each layer of our five-layer model.

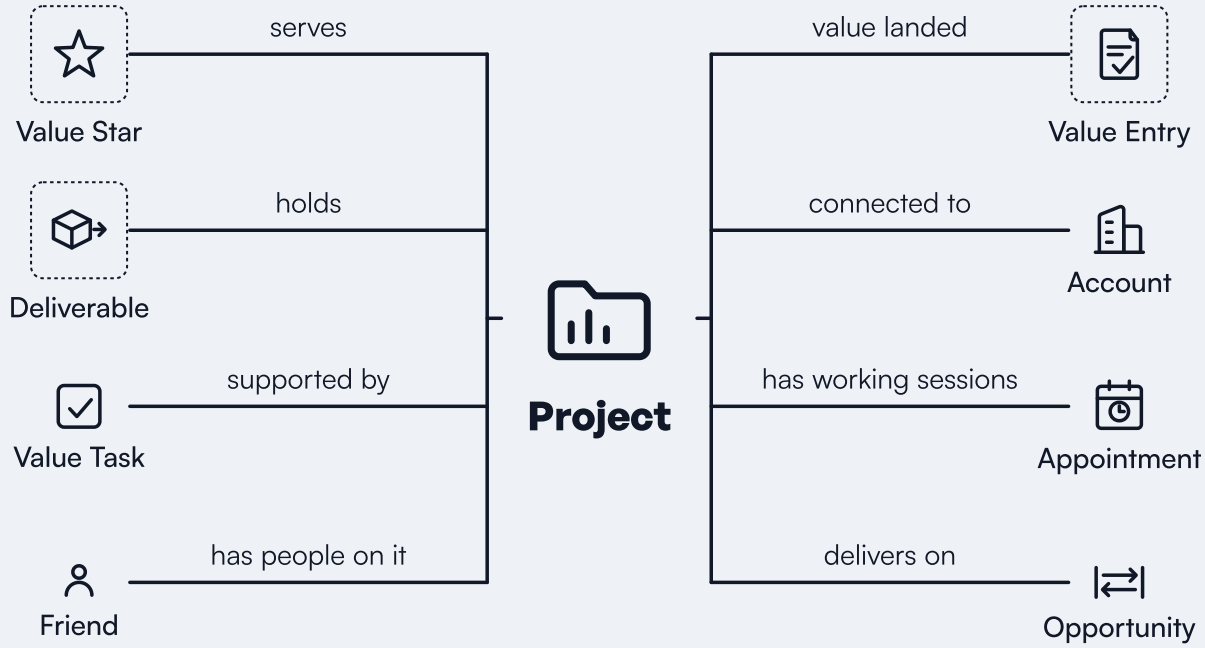
Whose value does it serve?

Value for the Customer · Value for the Company · Value for the Community

It depends on the work: a client engagement serves the people we work with, work on our own capability serves our organization, and a program serves our community.



What links to a Project?



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

A Value Star is a business goal; a Deliverable is what the work hands over; a Value Entry is a recorded moment where value actually landed.

Also connected, though not drawn: notes, show episodes, written records we keep, investments, services and more.

How does a Project move with us?

Build · 1 of 11 pipelines shown

Requested	Scoped	Building	Accepted	Live	Done

On Hold and Stopped sit beside these stages, not on the path. Done means everything the Project holds was delivered and acknowledged, or dropped. Value is read from the Value Entries linked to it, not from the stage.

Value-First Service

Service in HubSpot

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

A Service record holds one ongoing engagement: the recurring work we deliver, for as long as it continues.

That means a client's ongoing partnership, or a member's place in our membership. A bounded build goes on a Project; the agreement goes on an Order or a Contract.

Service or Project?

> "... the hard part is understanding which object to use when."



Chris Carolan, Another Orange Morning, 28 May 2026

Try it in your portal

Split ongoing from bounded. Keep the ongoing engagement on a Service and each build with an end on its own Project. Activate both: Settings › Data Management › Data Model › Manage › Activate object (Super Admin). Then add each Project to its Service.

Give each kind its own pipeline. Ours for ongoing partnerships runs from Service Activated to Value Activated Ongoing. Settings › Data Management › Objects › Services › Pipelines tab › Create pipeline. Needs a Starter, Professional or Enterprise subscription.

Connect each session. Our sessions are Appointments, which a Super Admin activates. Add each to its Service with a "session" label. No Appointments card on the Service? Add it: Record Customization › Default view. Needs Professional or Enterprise.

What do we keep about a Service?

Beyond HubSpot's usual service details, we keep:

What it aims to achieve. The outcome the engagement aims for, how success is measured and the business result it connects to.

Where the work stands. The current phase and its theme, and what happens before the next session.

The term. How many months it runs and how many sessions it includes.

Whose value does it serve?

Value for the Customer · Value for the Community

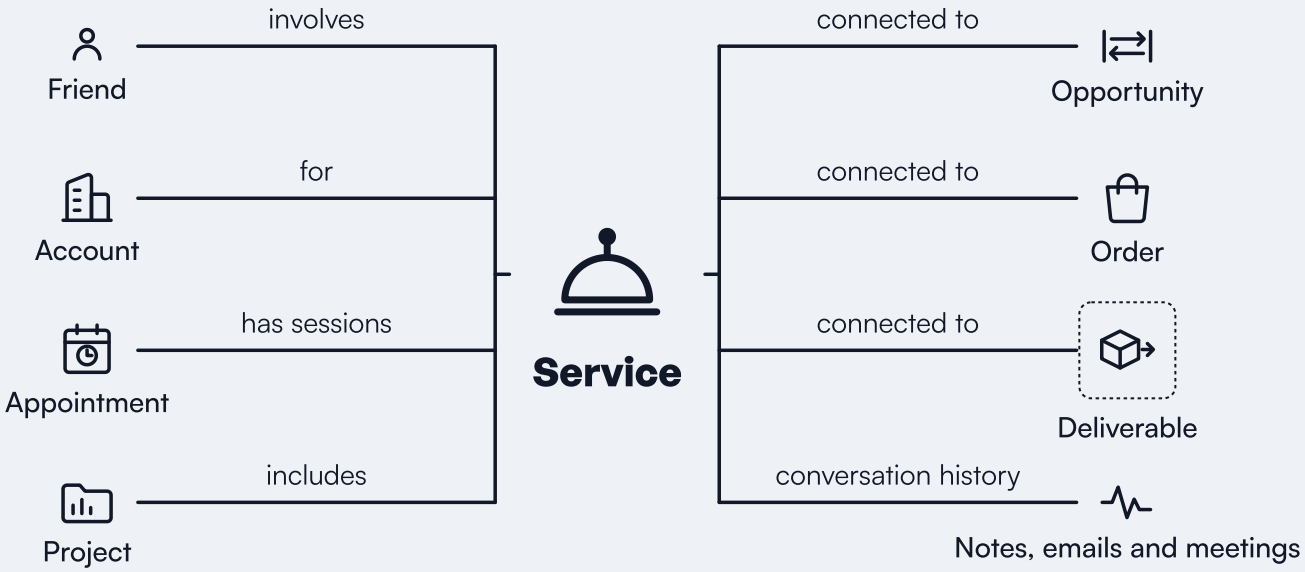
For the people and organizations we work with, the record shows what they are receiving now. Delivery is visible to every team: who does the work, and who answers for the result.





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

What links to a Service?



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

A Deliverable is one thing we promised to hand over.

Also connected, though not drawn: courses, tasks and more.

How does a Service move with us?

Ongoing Service Delivery · 1 of 10 pipelines shown

Service Activated	Active Participation	High Value Usage	Optimization Phase	Strategic Partnership	Value Activated Ongoing

Our ongoing partnerships and our memberships each have their own pipeline. This one is for ongoing partnerships, from the day the Service is activated to Value Activated Ongoing, which closes it.

Value-First Deliverable

Our own custom object in HubSpot

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

A Deliverable record holds one thing we promised to hand over, and its path until it is received.

That covers a plan, a website page, an audit, a set of coaching sessions or a video, for a client, a partner, a community member or our own team.

Why a Deliverable object?

> "Imagine three deliverables … One for training, one for installation, one for warranty activation …"
>
> Chris Carolan, Hubsessed Office Hours - HubSpot Super Admin, 9 October 2026

Try it in your portal

Give each kind a pipeline. Keep every kind of handover on one object, each kind on its own pipeline, as we do. Settings › Data Management › Objects › Pipelines tab › Create pipeline. Starter or above; Enterprise for custom objects.

Make Delivered mean received. Make Delivered require a received date, so no record moves there by hand without it. Settings › Data Management › Objects › Pipelines tab › Conditional logic rules › Add rule › Add property › Required. Enterprise for custom objects.

Keep the first promise. Beside the due date, keep a date for what you first promised. The due date can move; the promise stays. Settings › Properties › pick the object › Create property, field type Date picker.

What do we keep about a Deliverable?

Beyond its name, kind and description, we keep:

Three dates. The date first promised, the due date and the date received. The first promise stays when the due date moves.

What counts as done. The conditions the person it is for agrees will mean it was delivered.

Where it stands. Its status and next step, written for the person it is for, who sees it in the client workspace we share.

Weekly session packages. The day, time, time zone, length of each session and the weeks off that were agreed.

Whose value does it serve?

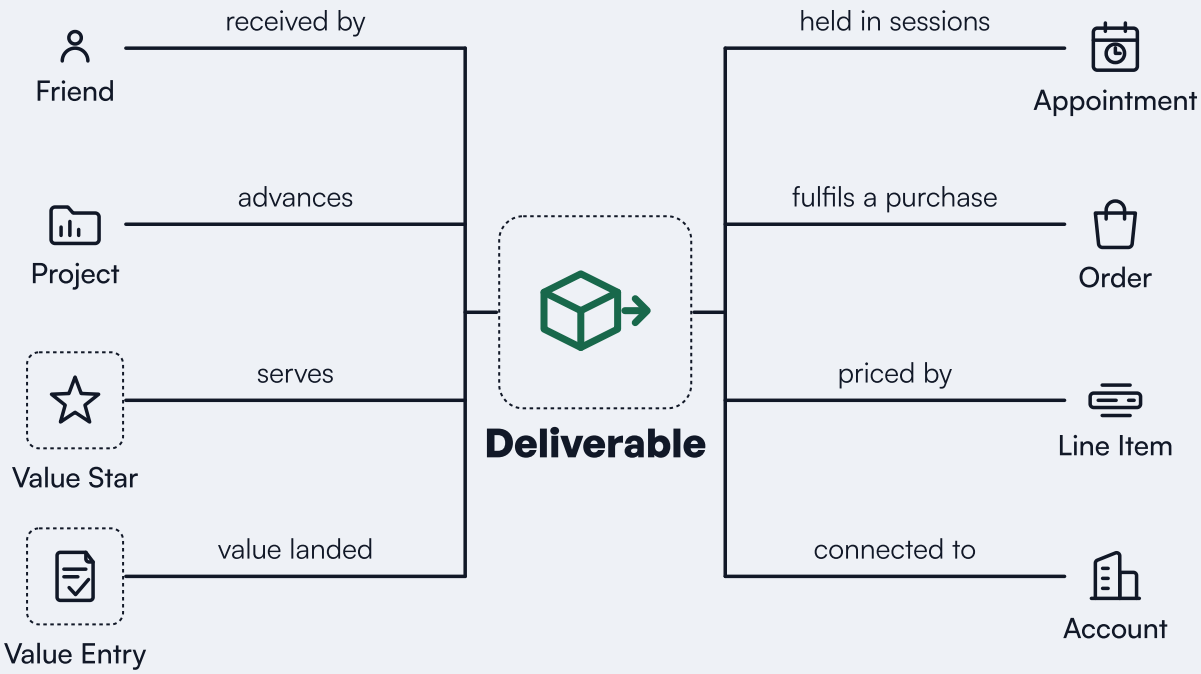
Value for the Customer

That means the person it is handed to. A Deliverable is done only when they confirm they received it; a colleague on our own team counts as a customer too. Whether it created value is recorded separately.



What links to a Deliverable?

Value-First Deliverable
Our own custom object in HubSpot



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

A Value Entry is a recorded moment where value actually landed; a Value Star is a business goal or initiative.

Also connected, though not drawn: Opportunities, tasks, tickets, services, notes and other Deliverables.

How does a Deliverable move with us?

Strategic Plans · 1 of 27 pipelines shown

Requested	Requirements Gathered	Scope Accepted	First Draft Completed
First Draft Reviewed	Final Draft Completed	Walked Through	Delivered

Each kind we hand over has its own pipeline. Every pipeline has a Delivered stage: the person it is for confirmed they received it. On Hold and Dropped sit beside the making steps. Value is recorded separately, in a Value Entry.

Value-First Listing

Listing in HubSpot

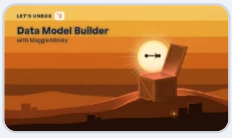
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

Our episodes, clips, recaps and articles, and many of our documents, are kept as Listings.

HubSpot built this object for property to be bought, sold or rented. We use it as the record of much of what we produce, from show episodes to documents.

Why a Listing?

> "I just never use it [Listings] for real estate, but I use it a lot for a lot of stuff. … I treat it like an index almost."



Chris Carolan, Let's Unbox: HubSpot Data Model Builder with Maggie Mirsky, 24 April 2025

Try it in your portal

Turn on Listings. Use them for what you make, not only property for sale: one record per episode, article or document. Data Management › Data Model › Manage tab › Activate object. All plans; Super Admin.

Give Listings stages. Add stages that keep recorded and published apart, as ours do. Settings › Data Management › Objects › Listings › Pipelines tab. Default pipeline: any plan; new one: Starter or above. Needs Edit property settings.

Label who is on it. Label the link between a contact and a Listing, such as host, co-host or guest. Data Management › Data Model › Edit Data Model › Create association label. Professional or Enterprise; Super Admin.

What do we keep about a Listing?

Beyond HubSpot's own listing properties, we keep:

What kind of thing it is. One choice that tells an episode from a clip, an article, a recap or a document.

What we drew from the recording. A summary, takeaways, keywords, sound bites and title ideas.

A guest's run-up. Whether the guest is invited, confirmed or declined, and which prep and thank-you messages went out.

Clips and kept moments. Where a clip sits in its episode; for a kept spoken moment, its exact words and whether we may use them.

Whose value does it serve?

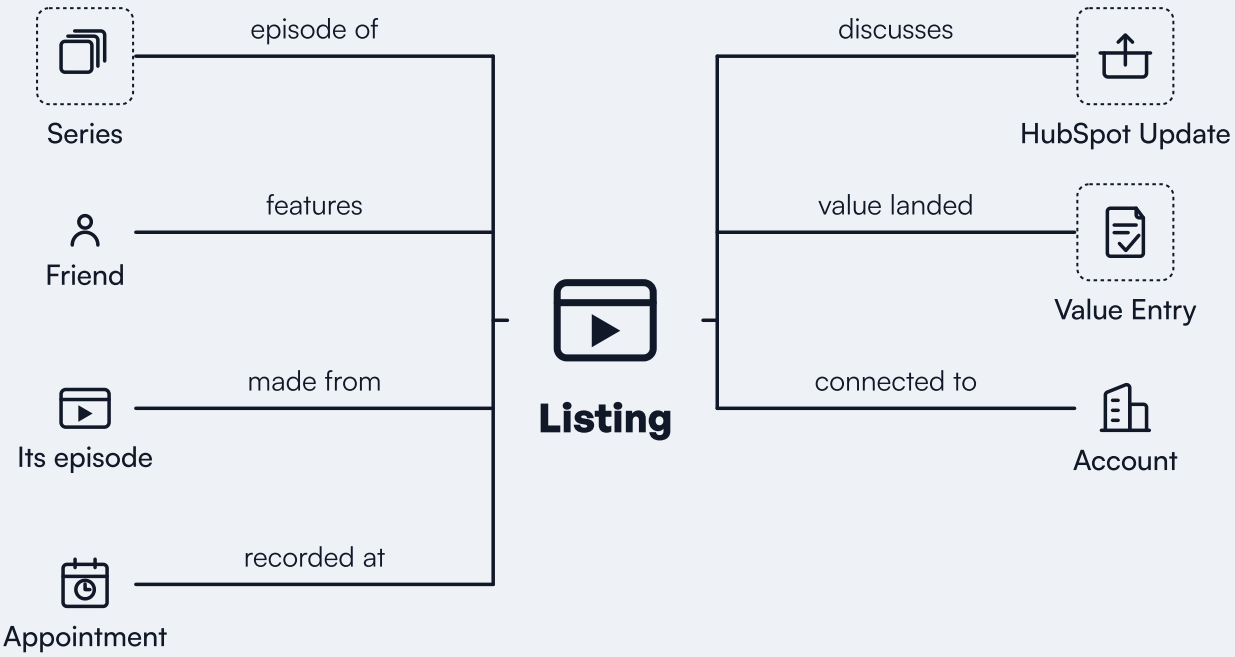
Value for the Customer · Value for the Community

That means the person who watches or reads each piece we publish, and the wider community, whether or not that person goes further with us.





What links to a Listing?



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

A Series is one show; a HubSpot Update is one HubSpot product change; a Value Entry is a recorded moment where value actually landed.

Also connected, though not drawn: published pages, projects, notes, tasks, saved collections of cards and more.

How does a Listing move with us?

Episode Library Management · 1 of 9 pipelines shown

Episode Planned	Booked & Prepped	Recording Complete	Recap Ready	Published

This is the production path for a show episode; other kinds of Listing use their own pipelines or none. Published says an episode went out, not that anyone was better off. Did Not Air closes an episode that never aired, with its reason.

Value-First HubSpot Update

Our own custom object, an Enterprise feature

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

Each HubSpot product update we follow has one record, kept current whenever it comes back on our show.

It holds what HubSpot shipped, which hubs and plans it touches, what we think of it, and each episode that discussed it.

Why a custom object?

> "...makes it easier to go bigger in terms of getting clips ready."



Chris Carolan, Another Orange Morning, 22 July 2026

Try it in your portal

Give each record one key. Key each record on a unique ID such as HubSpot's rollout ID, in a text or number property that requires unique values, so one release stays one record. Settings › Properties › Create property › Edit more options › Rules tab. All plans.

Label how deep a link goes. Label each episode link by depth, such as Mention or Deep Dive. Data Management › Data Model › Edit Data Model › Create association label. Super Admin only. Professional or Enterprise; Enterprise for custom objects.

Use a dropdown for status. When HubSpot, not you, decides the status, as when it moves an update from beta to live, record it in a dropdown, not a pipeline. Settings › Properties › Create property, field type Dropdown select. All plans.

What do we keep about a HubSpot Update?

Beyond HubSpot's own record fields, we keep:

Hubs, plans and status. Which hubs and plans it touches, and where HubSpot's rollout of it stands.

A signed take. Our point of view, a pull quote and who signed it, written only when someone has one.

What it is, why it matters. A description in plain words, and why the update matters to a reader.

First and last coverage. When we first covered the update and when we last did.

Whose value does it serve?

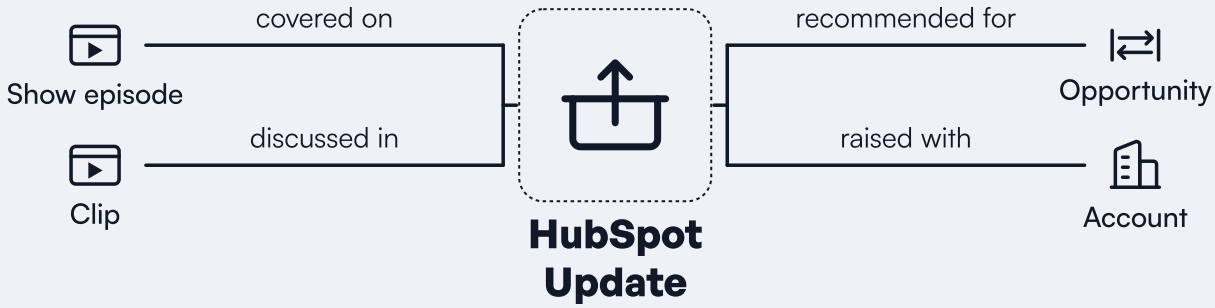
Value for the Customer · Value for the Community

That means both, on every record: the people who learn from our public updates pages without buying anything, and the clients we recommend an update to for their engagement.





What links to a HubSpot Update?



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

Can also link to notes, tasks, calls, emails and meetings, as any record can. Never a person's record: an update is not addressed to anyone.

How does a HubSpot Update change?

It has no stages. HubSpot moves an update from beta to live to sunset, and we record where it stands. Each time the update comes back on the show, the same record is updated and the new episode is linked. It is never written up a second time.

What is a HubSpot Update not?

Not a post. The roundup blog it replaced is retired.

Not HubSpot's announcement. It links to HubSpot's own page and adds what it means, whether it matters, and a signed take.

Not the episode. The episode is its own record; the update is what the episode discussed.

Value-First Course

Course in HubSpot

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

Every structured learning pathway we keep has one Course record.

That means a free beginner course, live bootcamps and workshops, an on-demand certification course or a multi-week program, each shared by everyone who takes it.

Why not build your own?

> "You don't need custom objects right out of the gate … courses … extra objects that you can rename."

Chris Carolan, Hubsessed Office Hours: Loop Marketing and AEO, 6 October 2026

Try it in your portal

Turn on Courses. Use HubSpot's own object before you build a custom one: one record per course, shared by all who take it. More › Data Management › Data Model › Manage tab › Activate object. All plans; Super Admin.

Label who teaches. Label the link between a course and a contact, such as "Instructor" and "took part", instead of adding progress fields. Data Model › Edit Data Model › Create association label. Professional or Enterprise.

Add a level. Make a dropdown on Courses with your own levels (ours run Beginner to Expert). Settings › Properties › Course properties › Create property, field type Dropdown select.

What do we keep about a Course?

Beyond HubSpot's own course fields, we keep:

Its level. How much experience it assumes, from Beginner to Expert.

Its kind. What kind of course it is, such as a bootcamp.

A certificate. Whether finishing it earns a certificate.

When it runs. Its start and end, and the length worked out from them.

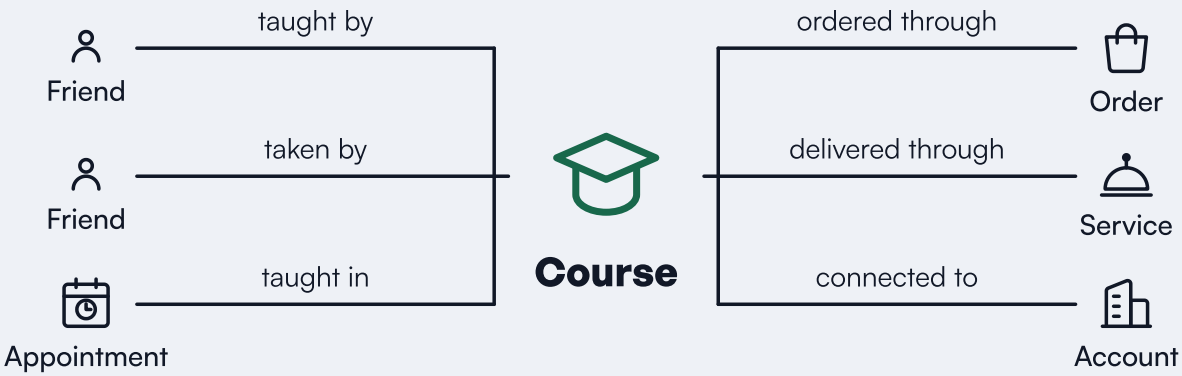
Whose value does it serve?

Value for the Customer

That means the people who take a course. They are the ones better off when it goes well, so the record serves them.



What links to a Course?



Also connected, though not drawn: projects, marketing events and emails.

How does a Course change?

A Course does not move through stages of ours. HubSpot gives it a default pair, Open and Closed, but we have written no meaning for either, so we use neither to say where a course is.

What is a Course not?

Not one team's journey. A Course is the pathway on the shelf. One client team's time through it is a Service, linked to the course.

Not the purchase. Access to a course, paid or free, is an Order of its own, linked to it. The course carries no price.

Not a session. One Course is the whole pathway. Each live session is an Appointment of its own, linked to the course.

Not one person's record. One Course is shared by everyone who takes it. Who teaches it and who took part are labelled links to Friends.

Value-First Ticket

Ticket in HubSpot

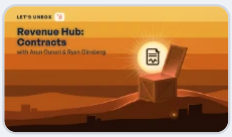
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

A Ticket record follows a request or a test step until it is answered, fixed or declined.

That means a support request, a question, a step a client tests before accepting our work, or feedback on something we built. Each kind has its own pipeline.

What is a ticket for?

> "Tickets for help desk … for triage moments, not built for managing post-sales … processes."



Chris Carolan, Unboxing HubSpot Revenue Hub: Contracts, 3 September 2026

Try it in your portal

Close on a "no" too. Add a closed stage for requests you decline (tickets call stages "statuses"), as ours ends on Resolved or Declined. Settings › Data Management › Objects › Tickets › Pipelines tab › + Add stage. All plans.

Record why it closed. Make a dropdown of your own reasons, such as Fixed, Works As Designed and Duplicate, to see where the friction is. Settings › Properties › Create property, field type Dropdown select. All plans.

Label who raised it. Label the person who raised a ticket apart from a person who is only kept informed, as we do. Data Management › Data Model › Edit Data Model › Create association label. Professional or Enterprise.

What do we keep about a Ticket?

Beyond HubSpot's usual ticket details, we keep:

Why it closed. One reason from our own list of nine, such as Fixed, Works As Designed or Duplicate.

Whose move it is. Ours or the client team's, shown to the client on their own pages.

What happened at a test step. Three yes-or-no answers about the step itself, never about the person testing it.

What they called it. A bug, feedback, a question or an enhancement, as the person who raised it chose.

Whose value does it serve?

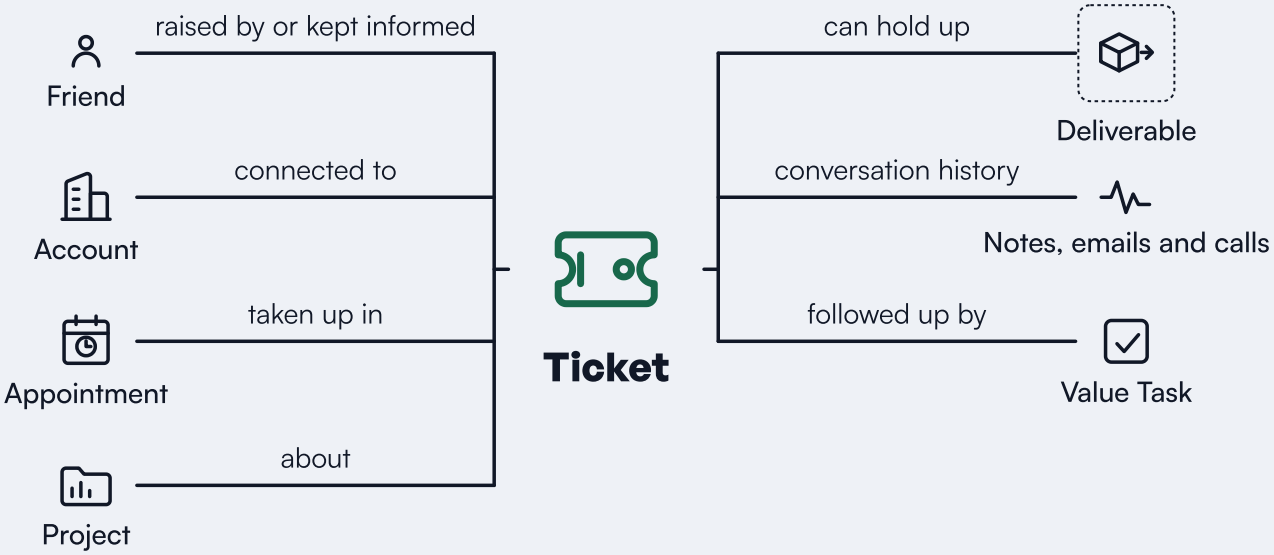
Value for the Customer

That means the people and organizations we work with. Tickets hold what one of them asked for, reported or tests before accepting our work.



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

What links to a Ticket?



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

A Deliverable is one thing we promised to hand over.

Also connected, though not drawn: show episodes, other tickets, inbox conversations and more.

How does a Ticket move with us?

Client App Feedback · 1 of 10 pipelines shown

Ticket Reported	Needs Your Input	Awaiting Prioritisation	Planned
In Progress	Awaiting Validation	Resolved	Declined

Each kind of request has its own pipeline, and each pipeline closes in words that suit the people who work it, including a clear no. A closed ticket does not mean value landed; that counts once the person it was for confirms it.

Value-First Meeting

Meeting in HubSpot

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

Each Meeting record is one calendar meeting: when it happens, what it is called, where, and who is invited.

Most come from a connected calendar, and nearly all link to the Friend records of those invited. The team's work goes on an Appointment beside it.

Why an Appointment?

> "... using appointments in HubSpot ... more granularly associate and manage meetings activity."



Chris Carolan, Another Orange Morning, 22 October 2026

Try it in your portal

Let your calendar write them. Connect your Google or Office 365 calendar and leave Calendar Sync on, so a meeting with a contact lands on their record. Settings › General › Calendar tab. All plans.

Work on an Appointment. Turn on the Appointments object and keep preparation and follow-up there, leaving the meeting as the calendar wrote it. Data Management › Data Model › Manage tab › Activate object. Super Admin only.

Share a booking link. Create a scheduling page so people book time on your calendar and the meeting arrives on its own. Sales › Meetings Scheduler › Create scheduling page. All plans.

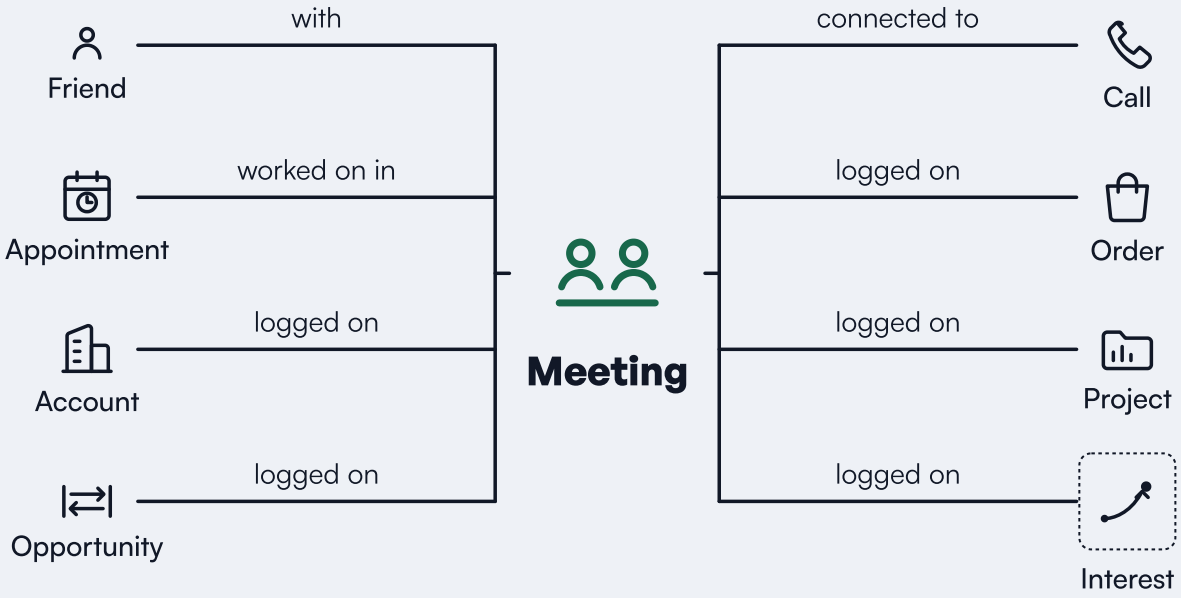
Whose value does it serve?

Value for the Customer

That means the people and organizations we work with. The meetings our calendars hold with them sit on their records, so anyone serving them sees when they last met and what is booked next.



What links to a Meeting?



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

An Interest is a relationship you recognize and develop.

Also connected, though not drawn: deliverables, services and campaigns.

How does a Meeting change?

A meeting doesn't move through stages. The stages we track for a gathering live on its Appointment. HubSpot's own outcome field says Scheduled, Completed, Rescheduled, No Show or Canceled.

Value-First Note

Note in HubSpot

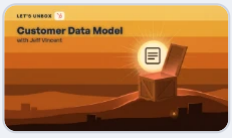
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

Every note holds one piece of written context, kept on each record it is about.

Our notes can also say what kind they are, such as a brief before a meeting or a record of a change, and who they are for.

Why notes in HubSpot?

> "... your meeting notes ... share that ... with HubSpot because that's valuable context ..."



Jeff Vincent, Let's Unbox A HubSpot Customer Data Model with Jeff Vincent, 27 June 2025

Try it in your portal

Link every record. Add each person, Account, Opportunity or ticket the note concerns, so it shows on every timeline. On a saved note: Activities tab › associations link. All products and plans.

Note each correction. When you correct something that matters, leave a note on the record saying who made the change and what changed. Note icon › Save note. All products and plans.

Write a new note, not an edit. When you redo a summary, add a new note instead of rewriting the old one, so the earlier version stays on the timeline. Note icon › Save note. All products and plans.

What do we keep about a Note?

Beyond HubSpot's usual text, date and owner, we keep:

What kind it is. A brief before a meeting, a synthesis after it, an observation, a record of a change and a few more.

Who it is for. Our team only, us and a delivery partner, or shared with the client.

Where a meeting stood. For a meeting note, whether it was written when the meeting was prepared, synthesized, canceled or rescheduled.

Which AI member wrote it. When an AI member of our team wrote the note into HubSpot, which one.

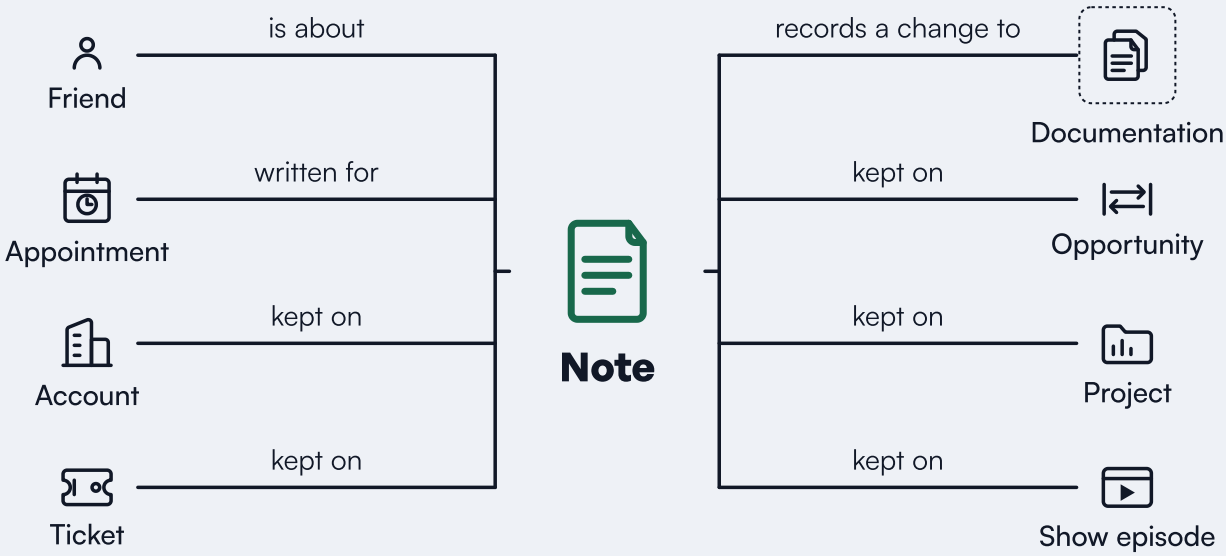
Whose value does it serve?

Value for the Customer

Notes serve the people and organizations we work with. What we learn with them stays on their record, so the next conversation starts from it instead of from scratch.



What links to a Note?



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

Documentation is a written record we keep in HubSpot; when someone corrects a client's written design, a note on it records the change.

Also connected, though not drawn: deliverables, orders, show series, services and more.

How does a Note change with us?

A Note does not move through stages; HubSpot offers it no pipeline. A meeting note records the moment in the meeting's life when it was written, and the note itself stays put. When we redo a meeting's synthesis, we write a new note and keep the earlier one.

Value-First Campaign

Campaign in HubSpot

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

A Campaign gathers everything we publish for one effort, such as a show, a launch or an event.

That means social posts, emails, blog posts, pages, forms, videos and podcast episodes. Its fields are HubSpot's own, used as they come.

Just an email send?

> "...[W]hen we think of campaigns, which most people do as simple as an email send..."



Chris Carolan, Another Orange Morning, 18 August 2026

Try it in your portal

One campaign for each show. Pick it under Add to campaign each time you post, so a show's posts sit together. Marketing › Campaigns › Create campaign, then the social composer. Marketing Hub Professional or Enterprise.

Show a status on every campaign. Add the Campaign status column, set each campaign's status in the table and filter by it. Marketing › Campaigns › Actions › Edit columns. Marketing Hub Professional or Enterprise.

Whose value does it serve?

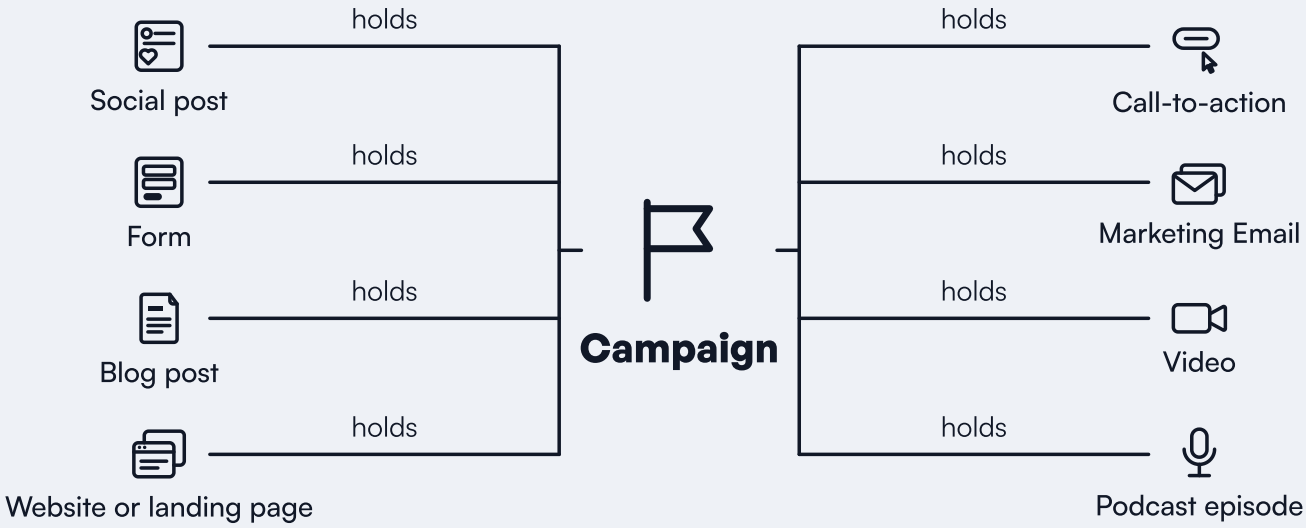
Value for the Customer · Value for the Community

That means the people and organizations we work with, and everyone who learns from the work without buying it. A Campaign gathers what we publish for both.





What links to a Campaign?



Also connected, though not drawn: events, lists, sequences, an Account, a meeting and a project.

How does a Campaign move with us?

Planned	In progress	Active	Paused	Completed

HubSpot gives a Campaign no pipeline, only a status. The status describes our own effort, never a person. We use three of HubSpot's five: Planned, Active and Completed. Finished work stays Completed.

Value-First Marketing Event

Marketing event in HubSpot

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

A Marketing Event record holds one event people register for, with who registered and who came.

That covers our Office Hours sessions, workshops and masterminds, and events others run where we take part, such as HubSpot's UNBOUND conference.

Why do portals go custom?

> "... marketing events has not been really easy to use. Not been a full fledged object."



Chris Carolan, Welcome Back, Casey, 28 October 2026

Try it in your portal

Sync your webinars. Connect the webinar app you use, such as Zoom or Microsoft Teams webinars, and each webinar becomes an event with who registered and who came, as ours do. Marketing › Events. All plans; Account Access to install apps.

Segment who came. Build a segment from an event's attendance, or from how long people stayed. CRM › Segments › Create segment › Contacts › Next › Add filter › Events tab › Marketing events. All plans.

Tie an event to a campaign. On the event's record, use the Campaigns card in the right sidebar: + Add, then pick the campaign. Marketing › Events. Marketing Hub Professional or Enterprise.

What do we keep about an event?

Beyond HubSpot's own event details and attendance counts, we keep:

Who it is for. The stage of our Value Path a workshop is meant for, or general.

Kind of workshop. One of ten categories, and a focus: general, technical and tactical, or strategic and transformational.

Key takeaways. What the workshop teaches.

Price. What a workshop costs, where it has a price.

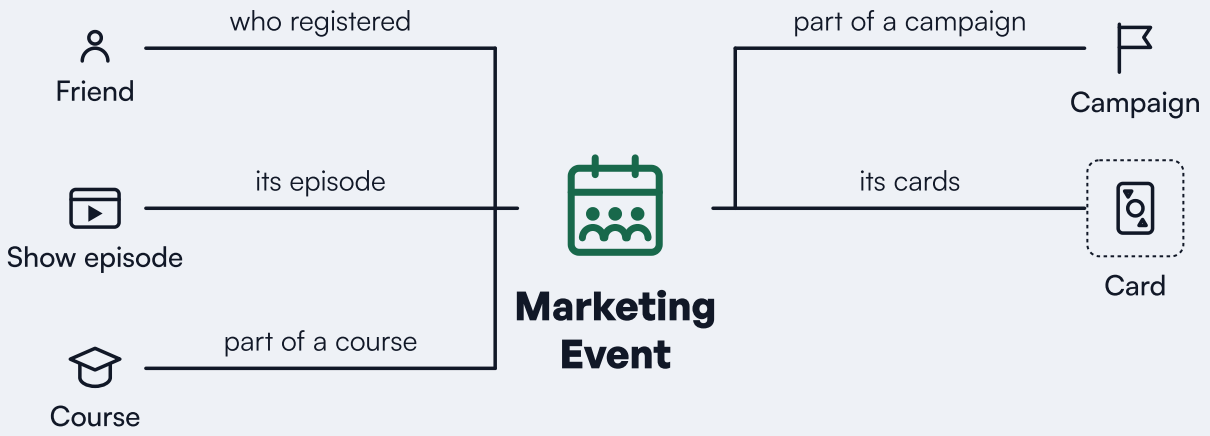
Whose value does it serve?

Value for the Customer

It serves the people who register and come, whether or not they are customers. Their attendance is context for the relationship, never proof that value landed.



What links to an event?



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

Card is our own object. For UNBOUND 2026, cards mark each person's role: at the event, on the stage, or in one session.

People reach an event through attendance, not a link you add. It can also connect to appointments, Opportunities, Accounts, projects and more.

How does an event move with us?

Planning	In Progress	Completed	Cancelled

Our portal has one pipeline for these records, with four stages; Completed and Cancelled are closed. HubSpot also works out its own status, which no one sets: Upcoming, Ongoing, Completed or Cancelled. Attendance fills in after the event, person by person.

Value-First Cart

Cart in HubSpot

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

A Cart holds the items a shopper chose in an online store, before they buy or leave.

HubSpot builds it in for stores that sync with it, such as Shopify. We use it as HubSpot ships it: no cart has ever reached our portal, and we add nothing of our own.

Try it in your portal

Look before you build. Open your carts and see what a store app has sent. We looked first, found our portal had never held one, and built nothing on it. CRM › Contacts, then Contacts › Carts. All products and plans.

Use a built-in property. Search an object's properties before you create one. Our Cart had three that repeated HubSpot's own. Settings › Properties, choose the object, then search. All products and plans.

Archive, don't delete. Archive a property you don't use; you can restore it for 90 days. Settings › Properties, hover the property, More › Archive. All products and plans.

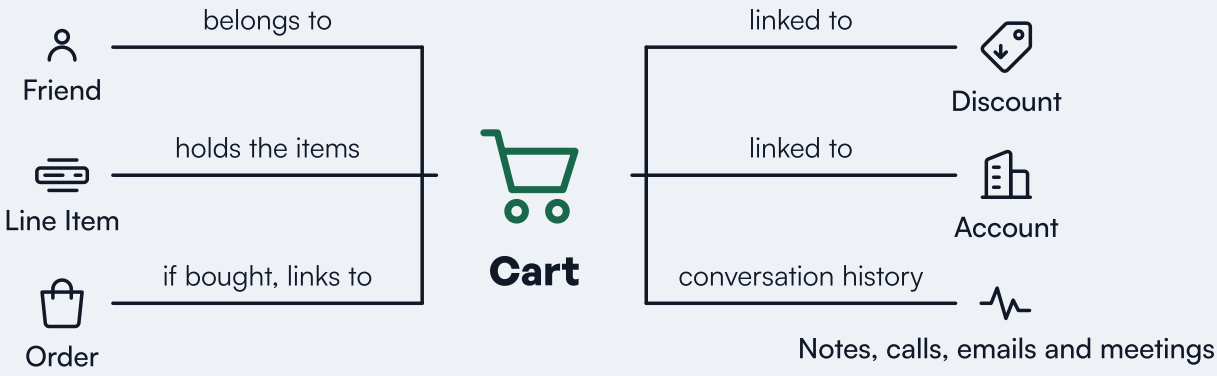
Whose value does it serve?

Value for the Customer

No one in our portal yet, because it holds nothing. Someone moving toward us is held on an Interest, one of our own records for a relationship we recognize and develop.



What links to a Cart?



HubSpot builds in every link shown here, and none is in use in our portal.

Also connected, not drawn: opportunities, quotes, tickets, tasks, messages, survey responses, postal mail, courses, listings and appointments.

How does a Cart change?

A Cart has no stages. The store that sent it writes its status as plain text, and HubSpot adds no pipeline. In our portal nothing has changed on one, because none has ever been made.

What is a Cart not?

Not a relationship. A Cart is one shopping session. A relationship is held on a Friend and their Interests.

Not ours to reshape. We add nothing to HubSpot's own design for it, and build no custom structure on it.

Not where we hold interest. Someone moving toward us is held on an Interest, never on a cart.

Value-First Call

Call in HubSpot

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

Each new Call holds one conversation and its notes, linked to the people in it.

We use Call as HubSpot ships it. Today it holds Chris Carolan's conversations with an AI member of our team, logged from ChatGPT. Older Calls hold recorded meetings.

Call or meeting?

> "I've always had a really hard time on what's a call, what's a meeting."



Casey Hawkins, Another Orange Morning, 23 June 2026

Try it in your portal

Log calls from ChatGPT. Connect HubSpot's ChatGPT connector, then ask it to log a call. Set Write tools to Needs Approval in its tool settings. Profile icon › Settings › Apps › HubSpot › Connect. Any plan, with an OpenAI account.

Link everyone on the call. Add each person in the conversation, an AI member of our team included, so the call shows on each timeline. Contact record › Log call › Association with records › Log activity. All plans.

Whose value does it serve?

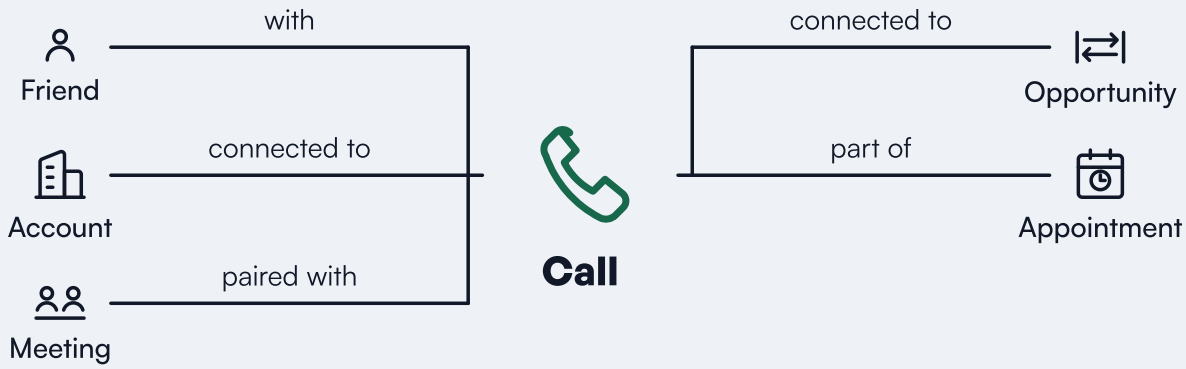
Value for the Customer

A conversation is kept on the records of the people who were in it.



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

What links to a Call?



Also connected, though not drawn: purchases, written records we keep, projects and more.

How does a Call change?

A Call does not move through stages. What changed is where a recording lives. Until early August 2026 a recorded meeting also arrived as a Call. Since 31 August 2026 HubSpot keeps a recorded meeting on the Meeting only.

What is a Call not?

Not where a show's recording lives. The episode and its video live on the episode's own record.

Not proof that value landed. A held conversation is context. Call numbers are never a measure of value.

Value-First Email

One-to-one email in HubSpot

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

Each Email record is one message, sent or received, almost always between us and a Friend (a HubSpot contact).

We use it as HubSpot ships it, with nothing added. Nearly every one sits on a Friend's record, so anyone serving them can read what was said.

Why not judge by opens?

> "… 'Yeah, of course they're not opening up these emails.' … they're busy trying to do business …"



Chris Carolan, Another Orange Morning, 12 June 2026

Try it in your portal

Log every email you send. Settings › Data Management › Objects › Activities › Email Log & Track tab: copy the BCC Address into your BCC line, so each message lands on the person's record. All plans; personal email access required.

Read the conversation. Before judging someone by opens and clicks, read what was said. Record › Activities tab › Emails tab › Filters, email direction. All plans; newer free accounts show 30 days.

Attach an email to the work. Show an email on the project, ticket or other record it is about. Activities tab › open the email › associations, then check the box for the record. All plans; link limits vary.

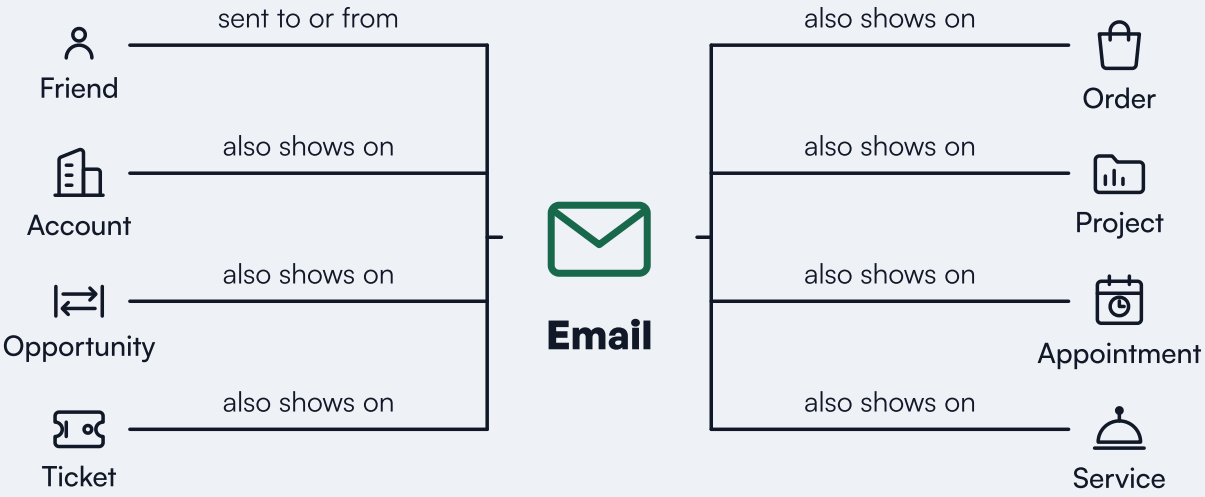
Whose value does it serve?

Value for the Customer

That means the people and organizations we work with. Anyone who serves a relationship can read what was already said, on the record they already work in.



What links to an Email?



Every link drawn here is HubSpot's own, with no label of ours. None of our own objects has an email on it.

Also connected, for example: courses.

How does an Email change?

An email does not move through stages. It was sent or it was received, and that never changes. Nothing on the record says what the message led to; what happened in the relationship is held elsewhere, never as a stage of the email.

What is an Email not?

Not a marketing email. That is one message to many people, a different object in HubSpot. This is one message, one to one.

Not proof that value landed. Value counts when the one who received it confirms it. A sent message is never that alone.

Not a measure of the person. Opens and clicks describe the message. Read them as context, never as a score.

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?

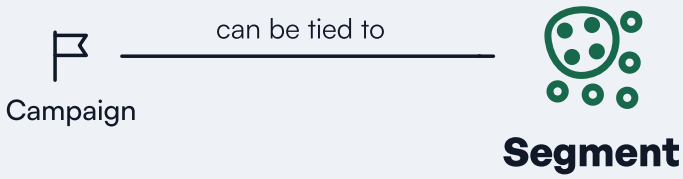
Value for the Customer

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.

Value-First Survey Response

Survey response in HubSpot

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

A Survey Response holds one person's reply to one feedback survey: the rating and any words they added.

HubSpot makes one from a reply to its loyalty, satisfaction, support or custom surveys. We use it as HubSpot ships it, and our portal holds none.

Why not score it all?

> "... we tried to standardize and normalize everything and score it ... we just didn't have the capacity."
>
> Chris Carolan, The Value Path with Joshua Oakes, 9 July 2026

Try it in your portal

Ask for their words. Add a follow-up question after the rating, so the reply holds their own words beside the number. Service › Feedback Surveys › Create survey, for a satisfaction or support survey. Service Hub Professional or Enterprise.

Tie it to the work. Pick Ticket pipeline or Deal stage (an opportunity stage) as the trigger, so the reply links to that ticket or opportunity too. Service › Feedback Surveys › Create survey, custom email survey, Recipients tab. Service Hub Professional or Enterprise.

Hear comments first. Tick "Only send notifications for survey responses that contain comments", so your team hears the replies with words. On a customer satisfaction or support survey's Automation tab. Service Hub Professional or Enterprise.

Whose value does it serve?

Value for the Customer

That means the people and organizations we work with. Our method keeps a rating inside the context of the relationship, never in place of understanding it. Value counts when the person who received it confirms it.



What links to a reply?



Every link drawn here is HubSpot's own. Our portal uses none of them, because it holds no survey responses.

Also connected, though not drawn: calls, orders, payments, invoices, quotes, subscriptions, carts, chats, marketing events and website content.

How does a Survey Response change?

It does not move through stages: HubSpot gives survey responses no pipeline. A reply is one moment, and a later reply from the same person is a new record. In our portal nothing has changed, because we hold no survey responses.

What is a Survey Response not?

Not where we keep confirmed value. That is a Value Entry, which a Survey Response has no link to.

Not a measure of value on its own. A rating says how someone felt. It earns its place only inside the relationship.

Value-First Opportunity

Deal in HubSpot

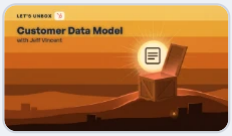
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

An Opportunity record holds one possible partnership while we work it out together with someone.

It gathers the conversations, the proposals and the mutual evaluation. When both sides commit, an Order records it.

Who joins an Opportunity?

> "... all five of these contacts associated to a deal ... 'Oh, no, one deal, one contact, one company.'"



Chris Carolan, Let's Unbox A HubSpot Customer Data Model with Jeff Vincent, 27 June 2025

Try it in your portal

Rename your stages. Name stages for the work both sides do, ending in a won stage (ours is Value Activated) and a lost one (Not Right Now); reports need both. Settings › Data Management › Objects › Deals › Pipelines tab. All plans.

Snapshot what they want. Add Multi-line text properties to your Opportunities for the client's starting point, goals and wanted outcomes. Fill them when the quote goes out; then leave them. Settings › Properties › Create property. All plans.

Link everyone taking part. Associate every contact involved, and their Account, not one contact per Opportunity. In the record's right sidebar, click + Add in the Contacts card. All plans; Super Admin or Edit associations permission.

What do we keep about an Opportunity?

Beyond HubSpot's usual details, we keep:

A copy of what they want. Their starting point, goals and wanted outcomes, copied when the quote goes out.

What they told us. Where they are, what is in their way and the next step they are ready for, in their own words.

Real or an example. Whether the Opportunity is real or a teaching example, which is never the source of a value claim.

Sponsorship terms. For a show sponsorship: the show, the period and the rate.

Whose value does it serve?

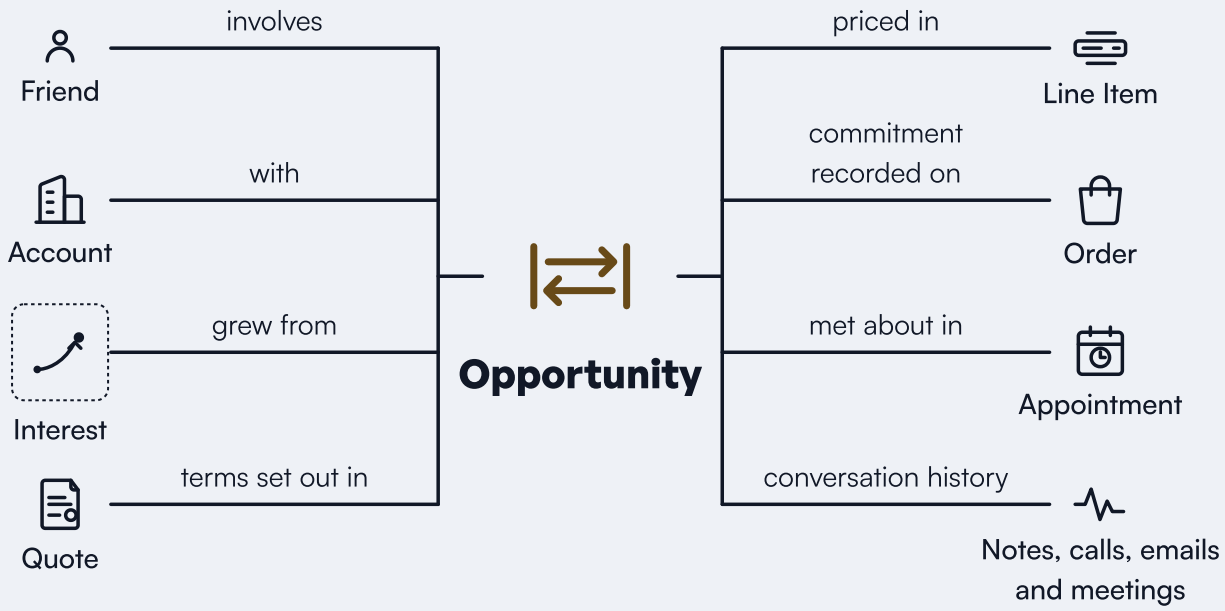
Value for the Company

That means the organization doing the work. Before anything is booked, the Revenue View makes the sales conversations, the opportunities and the proposals visible.



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

What links to an Opportunity?



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

An Interest is a relationship you recognize and develop.

Also connected, though not drawn: projects, invoices, payments, subscriptions, services, tasks and more.

How does an Opportunity move with us?

5 of 15 pipelines share these stages

Discover Value	Evaluate Value	Validate Value	Commit to Value	Value Activated

An Opportunity's stages follow the commercial work. Each person on it keeps their own place on the Value Path, the way people naturally progress with an organization. We call the good ending Value Activated: the commercial state of an Opportunity when a client moves from committed to receiving value.

What is an Opportunity not?

Not the relationship. Relationships are the unit of value creation; an Opportunity is one event within one.

Not a rating of anyone. No score or rating of a person is written on an Opportunity.

Value-First Order

Order in HubSpot

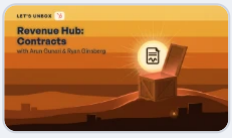
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

An Order records one purchase from us once it is agreed, and how far it has got.

In our portal that means someone signing up for a course or certification, or a client's engagement with us, such as a retainer or coaching.

What is an order record?

> "...the contract will come with an order that needs to be fulfilled eventually ... Why does it show up?"



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

Try it in your portal

Mark demo orders. Instead of a new pipeline, add an Order dropdown: real purchase or teaching example, so test orders never count as value. Settings › Properties › Order properties › Create property, field type Dropdown select. All plans.

Split recurring orders. If recurring orders go through different steps, give them their own Order pipeline, as ours has Active Cycle and Invoiced. Settings › Data Management › Objects › Orders › Pipelines tab › Create pipeline. Starter or above.

What do we keep about an Order?

Beyond HubSpot's usual order details, we keep:

Real or teaching example. Whether it is a real purchase or a teaching example, so demo and test orders never count as value.

How often it bills. One time, monthly, quarterly or yearly.

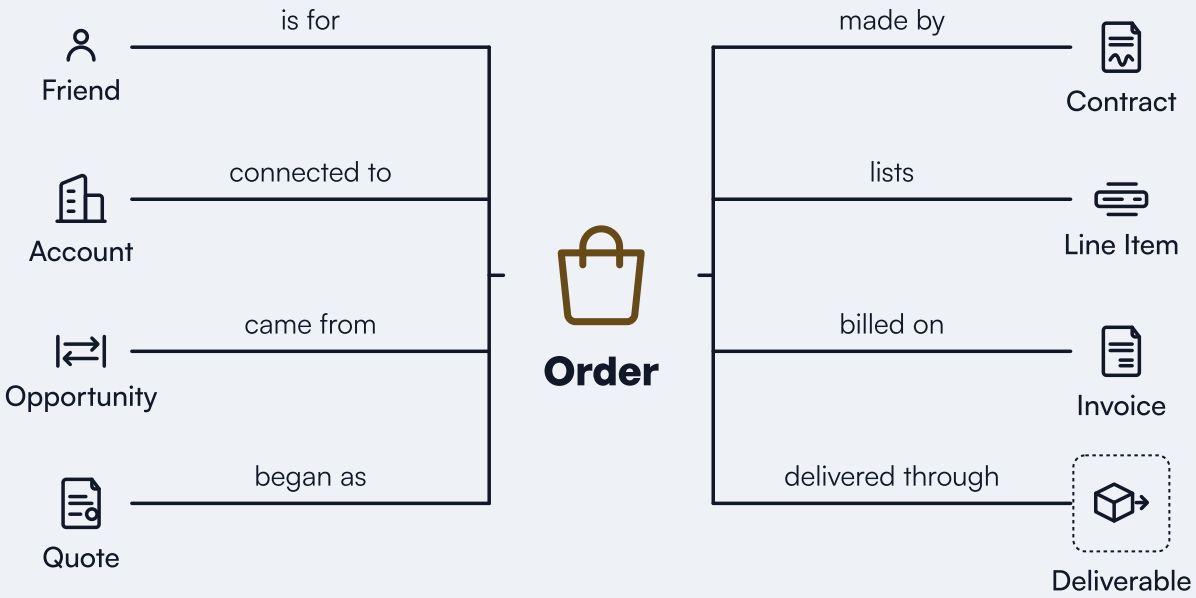
Whose value does it serve?

Value for the Company

That means our own organization. We can see what was agreed and how far it has got, through delivery, further orders and renewals. A paid Order is not proof that value landed.



What links to an Order?



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

A Deliverable is each piece of work we deliver under an Order; the Order itself holds the purchase.

Also connected, though not drawn: payments, subscriptions, services, notes, calls, emails and more.

How does an Order move with us?

One-time Order · 1 of 4 pipelines shown

Order Received	Order Confirmation	Processed	Shipped	Delivered	Value Activated	Cancelled

Stages show how far a purchase has got, not where a person is on their path. Recurring orders have their own pipeline: Order Received, Order Confirmation, Active Cycle, Invoiced, then Cycle Settled or Cancelled.

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.

Value-First Value Task

Task in HubSpot

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

A Value Task holds one piece of work someone has committed to do, and where it stands until it is finished.

The one doing the work can be one of us, one of the AI members of our team, or someone on a client's team.

Why one per commitment?

> "...the resulting output of that is 50 tasks. But clearly, there aren't 50 tasks to do."



Ryan Ginsberg, Another Orange Morning, 11 August 2026

Try it in your portal

Split Waiting from Deferred. We use Waiting when someone else holds the next step, Deferred when we chose to pause. Save a Waiting view to review each week. CRM › Tasks › Add view › Create new view › Advanced filters. All plans.

Link tasks to projects. Turn on projects, then associate each task with the project it supports. Data Management › Data Model › Edit Data Model › Projects › Activate object. Super Admin to activate; all plans.

Assign a task to a customer. When the work is the customer's own, assign it to them, then pick their contact. CRM › Tasks › Create task › Assigned to: Customer. Service Hub Professional or Enterprise.

What do we keep about a Value Task?

Beyond HubSpot's usual task details, we keep:

Where it came from. The moment in a session that made the task necessary, in one sentence.

What finishing it unlocks. The deliverable, session or piece of work this task holds up.

What it waits on. Who or what the task is waiting on, filled in when it is set to Waiting.

How it was finished. Our rule: a task closes with a note on the outcome.

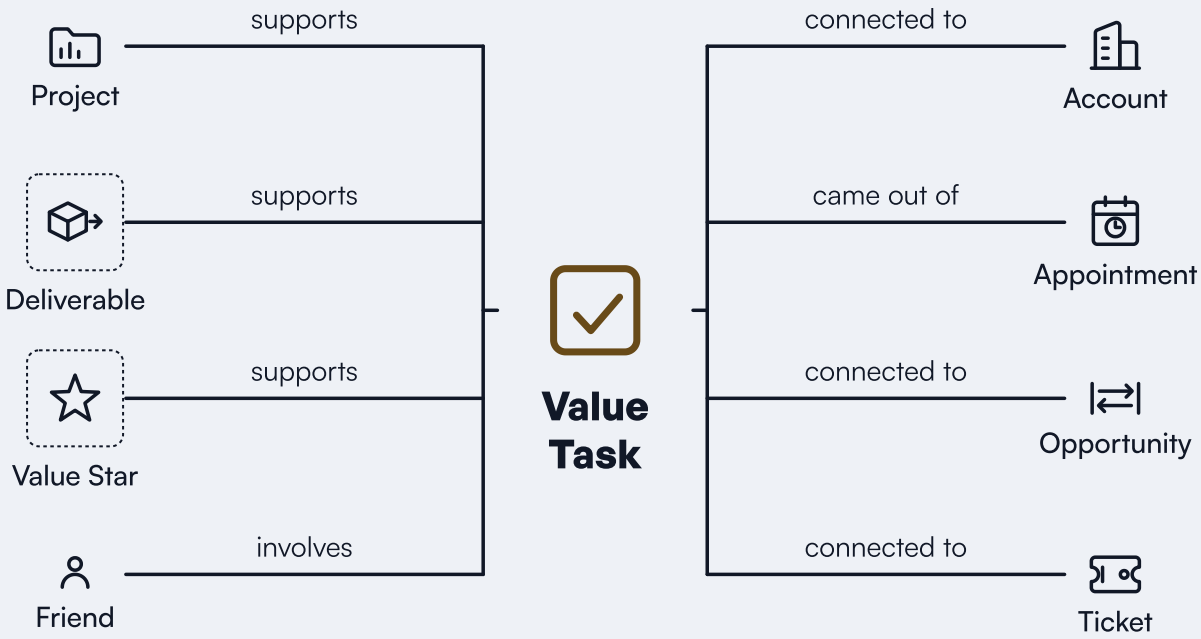
Whose value does it serve?

Value for the Company

That means the organization doing the work — its people, its capability, its ability to keep going. A Value Task holds one piece of committed work, and who is doing it.



What links to a Value Task?



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

A Value Star is a business goal or initiative. Our Deliverable holds a Value Mission, done only when its recipient confirms they received it.

Also connected, though not drawn: show episodes, Interests (relationships you recognize and develop), other tasks and more.

How does a Value Task move with us?

Not Started	In Progress	Waiting	Completed	Deferred

These are HubSpot's own task stages. Waiting means someone else holds the next step, and our rule is that the task names who. Deferred means we chose to pause it. A finished task means the work is done, not that value landed.

Value-First Quote

Quote in HubSpot

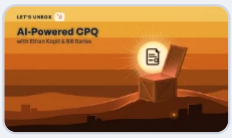
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

Each Quote record holds one written offer: what we propose, at what price and on what terms.

It is made for an Opportunity, sent to the buyer's people and offered to the buyer's company, with the priced lines listed.

Why build from records?

> "It becomes easiest when you really use the rest of HubSpot."



Chris Carolan, Let's Unbox HubSpot: AI-Powered CPQ, 21 October 2025

Try it in your portal

Start from the Opportunity. Create each quote from its Opportunity, so the buyer's contact and Account and its line items come with it. CRM › Deals › the Opportunity › Quotes card › + Add. Revenue Hub Professional or Enterprise, with a Revenue Hub seat.

Ask for a countersignature. Set the quote to e-signature, tick the buyers who must sign, then pick a countersigner from your own team. Quote editor › acceptance module › E-signature › Countersigners. Revenue Hub Professional or Enterprise.

Mark teaching examples. Add a dropdown property for real offers and examples (ours is Record Basis: Lived or Illustrative), then filter by it. Quotes › Actions › Edit properties › Create property, Dropdown select. Revenue Hub Professional or Enterprise.

What do we keep about a Quote?

Beyond HubSpot's usual quote details, we keep:

Real offer or example. Whether it is a real offer between real parties or a teaching example, which can never count as value.

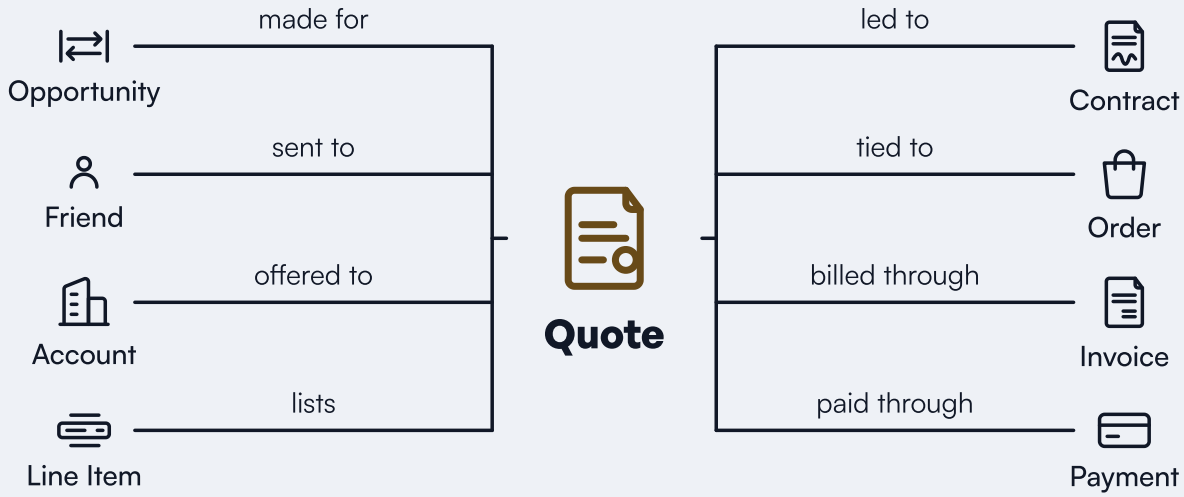
Whose value does it serve?

Value for the Company

That means our own organization, the one doing the work. Each Quote is a promise offered, and it gives the buyer's stakeholders something concrete to review, approve and reference.



What links to a Quote?



Also connected, though not drawn: the quote template, the colleague who countersigns, subscriptions, discounts and more.

How does a Quote move with us?

Draft	Published	Accepted	Expired	Void

A Quote has no pipeline, so these are HubSpot's own statuses. Before it goes out, an internal review can sit between Draft and Published. On our Value Path a Quote belongs to the Buyer stage, "I am buying". An accepted Quote points on to the agreement, held on its own Contract or Order.

Value-First Invoice

Invoice in HubSpot

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

Each Invoice is one bill: an amount asked of a named person or company, under something already agreed.

It records what we asked for, never the money. What actually arrived is kept on its own record, a Payment.

What does “billed” mean?

> “[Billed] is an invoice. Did something go out that is allowed to be paid against …”
>
> Chris Carolan, Hubsessed Office Hours: Unified Revenue View, 1 October 2026

Try it in your portal

Check paid against payments. Add Amount paid and Balance due beside Invoice status. Amount paid counts non-failed payments, so a bill marked Paid with no payment behind it stands out. More › Revenue › Invoices › Edit columns. All plans.

Mark teaching records. Add a dropdown that marks each bill real or teaching, so examples never count as real value (ours: Lived or Illustrative). Settings › Properties › Invoice properties › Create property (Dropdown select). All plans; limits vary by plan.

Find late bills by age. Filter invoices by Age category, such as 90+ Days. Days overdue is stored as a date and shown as a relative date, not a count of days. More › Revenue › Invoices › Advanced filters. All plans.

What do we keep about an Invoice?

Nearly all of it is HubSpot’s own. Beyond that, we keep:

Lived or Illustrative. Whether a bill is real, or an example made to teach. An example can never be the source of a value claim.

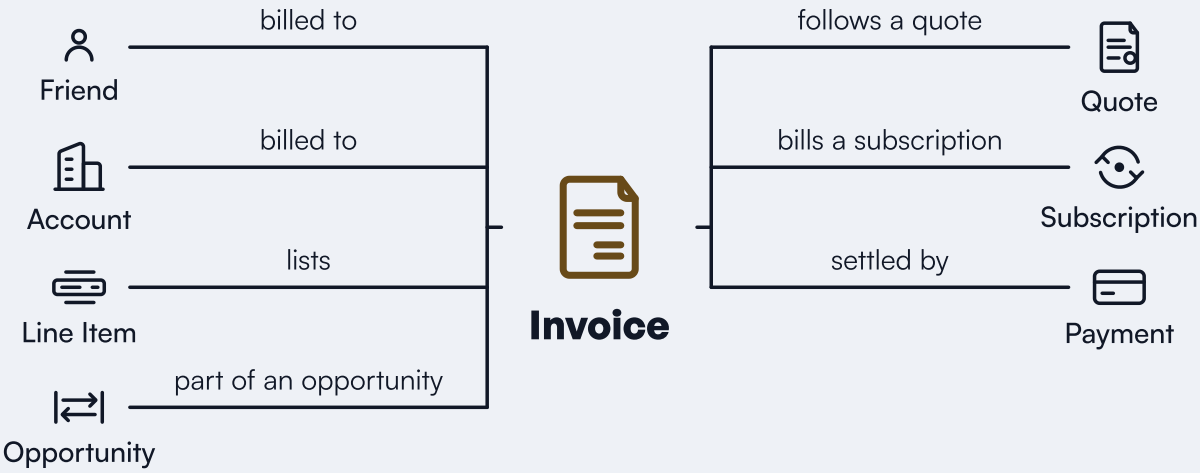
Whose value does it serve?

Value for the Company

That means the organization doing the work: its people, its capability, its ability to keep going. In our method, billed (the invoice) is one of four statuses, with booked, earned and paid; they can be true together.



What links to an Invoice?



Also connected, though not drawn: contracts, orders, payment links, payouts, projects and more.

How does an Invoice change?

An Invoice has a status, HubSpot's own: Draft, Open, Paid or Voided. It does not move through steps. A voided bill stays on the record, and payment can no longer be collected on it.

What is an Invoice not?

Not the agreement. The agreement is its own record, and one agreement can make many invoices.

Not proof the work was done. Our method keeps billed and earned apart. Even a paid bill does not show the promise was kept.

Value-First Payment

Payment in HubSpot

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

A Payment record holds one amount of money that reached us, from a named person, at one moment.

In our portal, every Payment is connected to the person who paid, our Friend record (HubSpot's Contact). It holds only the money; commitments live on their own record.

Why only the money?

> "So the promise is often much more than the payment itself."
>
> Chris Carolan, Hubsessed Office Hours: Unified Revenue View, 1 October 2026

Try it in your portal

Record outside money. Log a bank transfer or a charge from another processor as a Payment. Revenue › Payments › Add payments › Collect a payment › Or create a manual payment. All plans. Super Admin or Manage payments and subscriptions permission.

Link payments to people. From a contact or subscription, open the preview. Payments card › + Add › tick the payments › Save. A person can have many payments; each payment has one person. All plans.

Count what went through. HubSpot also keeps failed and refunded payments. Filter Revenue › Payments by Status: Succeeded. All plans; Super Admin or Manage payments or subscriptions permission.

What do we keep about a Payment?

Beyond HubSpot's own amount, date, status and fees, we keep:

Real or teaching example. Whether it is a real payment or an example made for teaching. An example never backs a claim about value.

Its phase in our Unified Revenue View. Settled once the payment went through; Closed if it was refunded or failed for good.

Who recorded it. When an AI member of our team writes a Payment, the record names the one that wrote it and the one that asked.

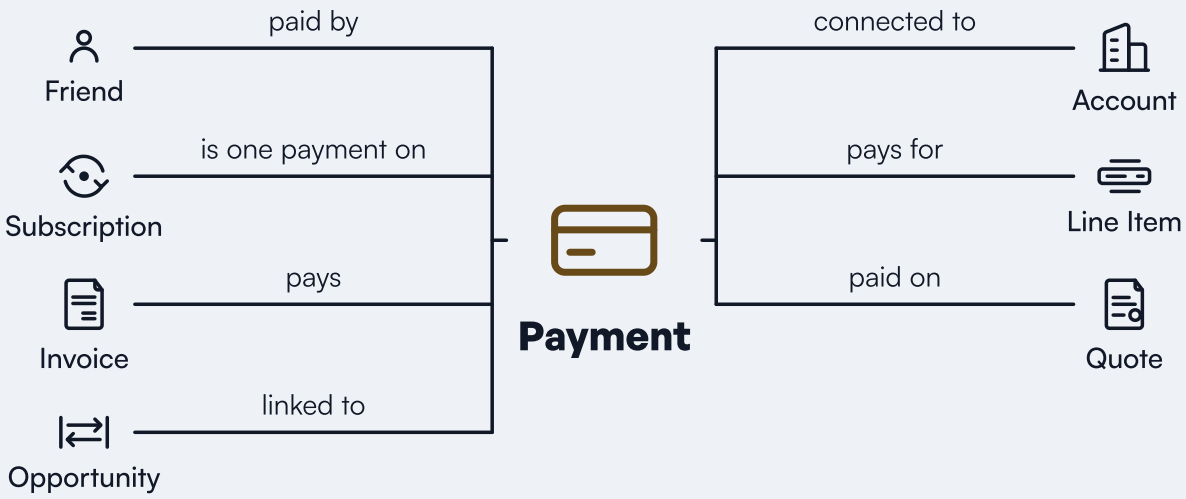
Whose value does it serve?

Value for the Company

It serves the organization doing the work. Our method reads money as the wake of value: "it is recorded after the value, and it is never the thing the view steers by."



What links to a Payment?



Also connected, though not drawn: payouts, payment links, discounts and orders.

How does a Payment change?

A Payment has no stages. HubSpot gives each one a status, such as Succeeded, Failed or Refunded, and a payment recorded by hand starts as Succeeded and stays that way.

What is a Payment not?

Not a bill. What we asked someone to pay is an Invoice. A Payment is what arrived.

Not a promise to pay. A commitment, such as a subscription, lives on its own record. A Payment is one event within it.

Not proof that value landed. Money moving says the money moved, nothing more.

Value-First Subscription

Subscription in HubSpot

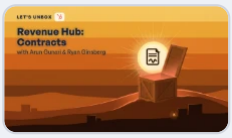
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

A Subscription holds one arrangement that bills on a schedule: what, how often, and what is due next.

This is recurring billing, not email subscriptions. Each one is with a person, often their company, and bills for set line items.

Where does it sit?

> "... the recurring lines on a contract are the subscriptions."



Arun Gunari of HubSpot, Unboxing HubSpot Revenue Hub: Contracts, 3 September 2026

Try it in your portal

Record how it ended. Add a dropdown for the ways a subscription can end, and a date for when that became certain. Settings › Properties › Subscription properties › Create property. All products and plans.

Keep their own words. Add a multi-line text property for what someone said about leaving, word for word. Same path as above. All products and plans.

Bill outside HubSpot. Switch on the Display option under Invoice creation, then turn invoices off per subscription; it stays a record, not a bill. Settings › Objects › Subscriptions; Revenue › Subscriptions. All products and plans; Super Admin.

What do we keep about a Subscription?

Beyond HubSpot's own billing fields, we keep:

How it ended. Whether they chose to end it, payment lapsed or a gifted term ran out, and the date that became certain.

Their own words. What they said about leaving, word for word, with where it came from.

Where it came from. Whether the reader paid membership began on our watch or came with a newsletter we took on.

Real or teaching example. Lived or Illustrative. An illustrative record is never the source of a claim that value moved.

Whose value does it serve?

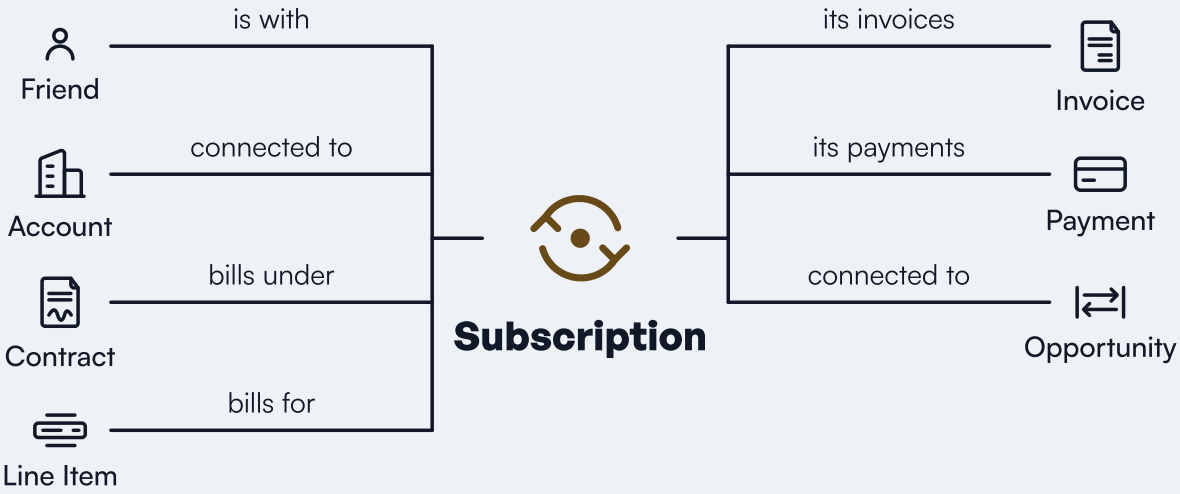
Value for the Company

That means our own organization. A Subscription records the billing, and money is read as the wake of value: recorded after the value, never what we steer by.



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

What links to a Subscription?



Also connected, though not drawn: quotes, payment links, orders and more. A quote or a payment link can create one.

How does a Subscription change over its life?

A Subscription has no stages. HubSpot sets its status as billing happens: Active, Past due, Unpaid, Canceled, Expired, Scheduled or Paused. When one ends, we record how, and when that became certain.

What is a Subscription not?

Not the relationship. Relationships are where value is created. A Subscription records the billing inside one.

Not the work. A Subscription bills; a Service delivers. Paying on a schedule is not the same as the work being done.

Not the agreement. It never holds the rates or terms. The agreement does, and the Subscription runs the billing against them.

Value-First Line Item

HubSpot's own Line item, under its own name

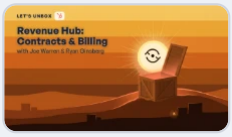
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

Most Line Items hold one product or service on one Opportunity, quote, order, invoice or subscription, as agreed.

That means what it is, how many, at what price and how often. For us, lines record what we sell: workshops, consulting calls, apps, and subscriptions to our publication.

Why the line?

> "The line item is the atomic entity … The contract is just the container …"



Ryan Ginsberg, Let's Unbox: Unboxing Revenue Hub - Contracts & Billing, 4 August 2026

Try it in your portal

Put per-sale facts on the line. Make a per-sale field on lines, not products: a product field is copied onto every line and cannot be modified there. Our field is kind of work. Settings › Properties › Line item properties › Create property. All products and plans.

Mark teaching examples. Add a dropdown with two options, real or example, so a line made for a demo or a lesson is never read as a real sale. Same place: Settings › Properties › Line item properties › Create property. All products and plans.

What do we keep about a Line Item?

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

Kind of work. What the line pays for, from about two dozen kinds, such as workshops, consulting calls, apps and implementations.

Real or example. Whether it records a real exchange or a teaching example, which is never the source of a claim that value was created.

Whose value does it serve?

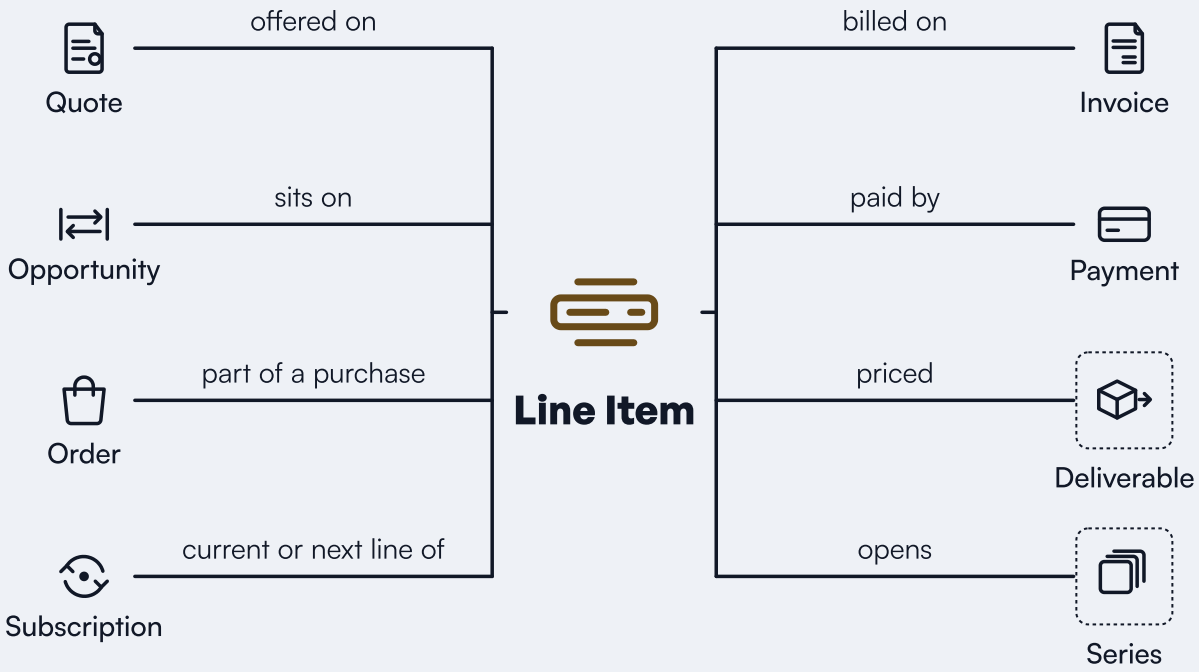
Value for the Company

That means the organization doing the work. Each line records the price of one thing we promised, and the promise is followed as booked, billed, earned and paid: statuses, not steps.



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

What links to a Line Item?



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

A line can link to the Deliverable it priced; a subscription's line can link to the Series (show or publication) it opens.

Also connected, though not drawn: payment links, discounts and contracts. Most lines also name the product they came from.

How does a Line Item move with us?

It has no stages. A line is written when something is agreed, and changing it changes the agreement. What moves is the Opportunity, quote, invoice or subscription it sits on.

Value-First Contract

HubSpot's own Contract object

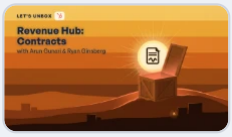
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

One Contract holds one agreement with a customer: what was agreed, for how long, and how it is billed.

We use Contracts as HubSpot ships them, with no field of our own. A record names both sides: the customer's company and people, and the seller's details.

Why use Contracts?

> "If you have any kind of post-sales revenue goals … you will get value out of using contracts."



Chris Carolan, Unboxing HubSpot Revenue Hub: Contracts, 3 September 2026

Try it in your portal

Let a quote make the Contract. Switch on "Create contract records from accepted quotes". With your billing setting on, the first invoice goes out at once. Settings › Data Management › Objects › Contracts. Revenue Hub Professional or Enterprise; Super Admin.

Keep a Contract without billing. Switch Billing off when you create it, and it holds the agreement while you bill another way. Revenue › Contracts › Add contracts › Create new. Any plan; a beta a Super Admin turns on first.

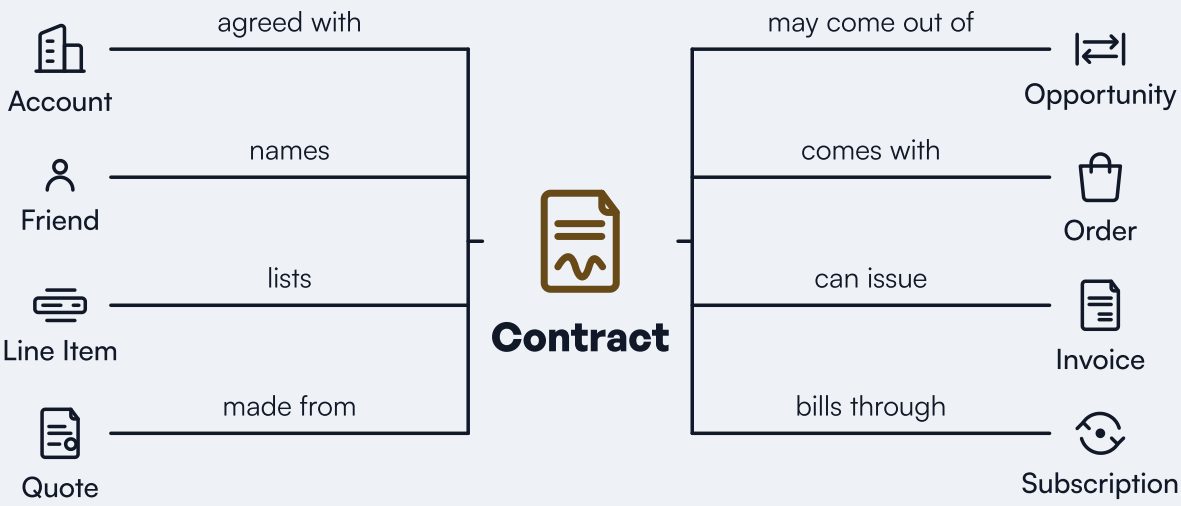
Whose value does it serve?

Value for the Company

That means our own organization. A Contract holds one agreement's commitments on one record, beside what has been billed and paid against them.



What links to a Contract?



Friend is HubSpot's Contact. Also linked: renewals, credit memos, projects, tasks, notes and more. Payments arrive through invoices.

How does a Contract change?

A Contract has no stages. HubSpot marks whether it is in effect: draft, active, completed or terminated. A renewal is a new Contract, linked to the one before it, never a change to the old one.

What is a Contract not?

Not the sales conversation. That is the Opportunity. A Contract can exist with no Opportunity behind it.

Not seen by customers. They receive quotes, invoices and receipts, never the Contract.

Not a legal contract. HubSpot says its contracts do not replace signed legal agreements.

Value-First Price Book

Price book in HubSpot

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

A HubSpot price book is a named set of prices, so one product can carry a different price per currency or group of buyers.

We use price books as HubSpot ships them, and have set none up. Each opportunity's agreed price sits on its own line items instead.

Why is it hard?

> "... price books, CPQ, and all this stuff have been so complex for humans to manage on their own."



Chris Carolan, Another Orange Morning, 21 July 2026

Try it in your portal

Set the agreed price on the opportunity. Edit a line item for this opportunity only; the product in your library keeps its own price. Deals (our Opportunities) › the record › Line items card › Edit › hover over a line item › Actions › Edit. All products and plans.

If you use price books, let the seller choose. With no assignment rules, sellers pick one on the opportunity. HubSpot advises testing rules with auto-assignment off. Products › Manage price books › a book › Assignment rules. Revenue Hub Professional or Enterprise.

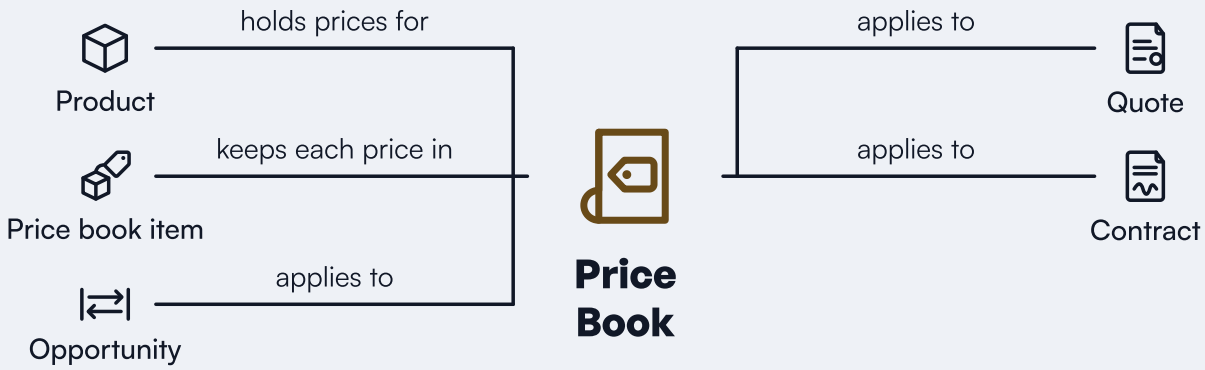
Whose value does it serve?

Value for the Company

That means our own organization. A price is part of the promise we make, so a price book would belong in our whole commercial picture. We leave it empty and set each price with the client, on the opportunity.



What links to a Price Book?



HubSpot builds in every link shown here, and none is in use in our portal.

How does a Price Book change?

A Price Book has no stages, and HubSpot allows no pipeline on this object. Its only state is a switch, active or inactive. In our portal nothing has changed on one, because none has been made.

What is a Price Book not?

Not the product. What we offer is a Product, with its own name and description. A price book only holds prices for products.

Not tied to a person. A price book never links to a person or an Account. HubSpot applies one by rules on the opportunity.

Not the agreed price. The price a client agreed to sits on the opportunity's line items, never in a price book.

Value-First Value Star

Our own record type on a custom object in HubSpot

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

Each business goal we work toward has its own Value Star record, whether it is on our board or off it.

One project can serve several goals. This season's board holds 20 of them, and our tools read each record every day.

Why twenty goals?

> "What if I just did big 20? … Here's everything I can think of right now that I care about."
>
> Chris Carolan, Launching A Value-First Summer — The Solstice Broadcast, 20 June 2026

Try it in your portal

Write down what done means. Give each goal two multi-line text fields: what done means, and what it does not cover. Settings › Properties › Create property, field type Multi-line text. Custom objects need Enterprise.

Give goals value stages. Build a pipeline whose stages read how far value has reached people, and keep work stages on projects. Settings › Data Management › Objects › Pipelines tab. Starter or above; Enterprise for custom objects.

Label what a project serves. Create a pair of association labels between projects and goals, such as "serves" and "served by". Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

What do we keep about a Value Star?

On each goal's record, we keep:

What done means. What the goal is for, in its owners' words, and what it deliberately does not cover.

Its projects, in order. The projects that serve it, in the order the goal takes them.

Where it stands on the board. On this season's board, waiting for a decision, or off the board. The record stays in every case.

How far its value has traveled. Foundation, Capability or Multiplication, read from its stage.

Whose value does it serve?

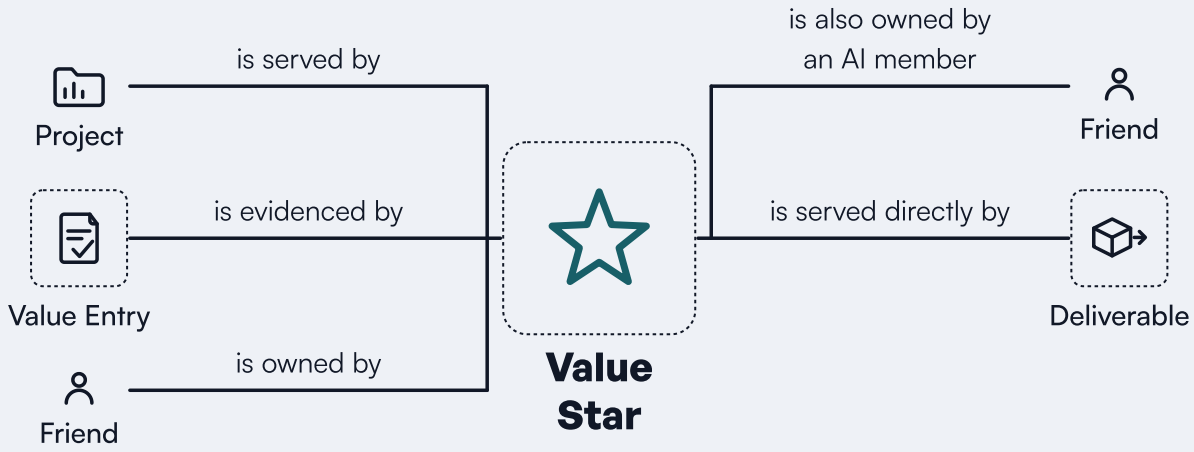
Value in Context

That means the decision, and whoever has to make it. A goal's record keeps what we decided it is for and which projects serve it, so the next decision starts from what we know.



What links to a Value Star?

Value-First Value Star
Our own record type on a custom object in HubSpot



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

A Value Entry is a recorded moment where value actually landed; a Deliverable holds a Value Mission, done when its recipient confirms they received it.

Also connected, though not drawn: gatherings, calls, notes, tasks and other written records.

How does a Value Star move with us?

Foundation · built, nothing outside the team yet

Value Requested	Value Defined	Value Scope Accepted	Value Roadmap Documented	Value Work Started	Value Validated	Value Ready

The shift comes when value first reaches someone outside our team.

Capability · value reaching people repeatably

Value Accessible	Value Activated	Value Realized	Value Repeating	Value Sustained

Multiplication · value compounds

Value Shared	Value Championed	Value Lifted

Stages read how far value has reached people, never how much work is done; projects carry the work stages.

Value-First Product

Product in HubSpot

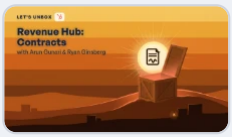
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

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.

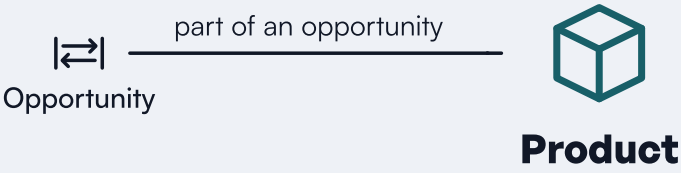
Whose value does it serve?

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.



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.

Value-First Content Hub

Content in HubSpot

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

Each Content Hub record stands for one page or post published with HubSpot's website tools.

We use it as HubSpot ships it. HubSpot makes the record when something is published; it covers pages and posts, never people, and we add no fields.

Try it in your portal

Group pages under a campaign. Add a campaign's pages and posts, as we did for 2023 to 2025, so its Assets tab lists them. Marketing › Campaigns › open one › Actions › Add assets. Marketing Hub Professional or Enterprise.

Keep episodes on a Listing. Content Hub records cannot link to contacts (our Friends), so we keep each episode on a Listing (HubSpot's property object), linked to its people. Data Management › Data Model › Manage › Activate object. Super Admin.

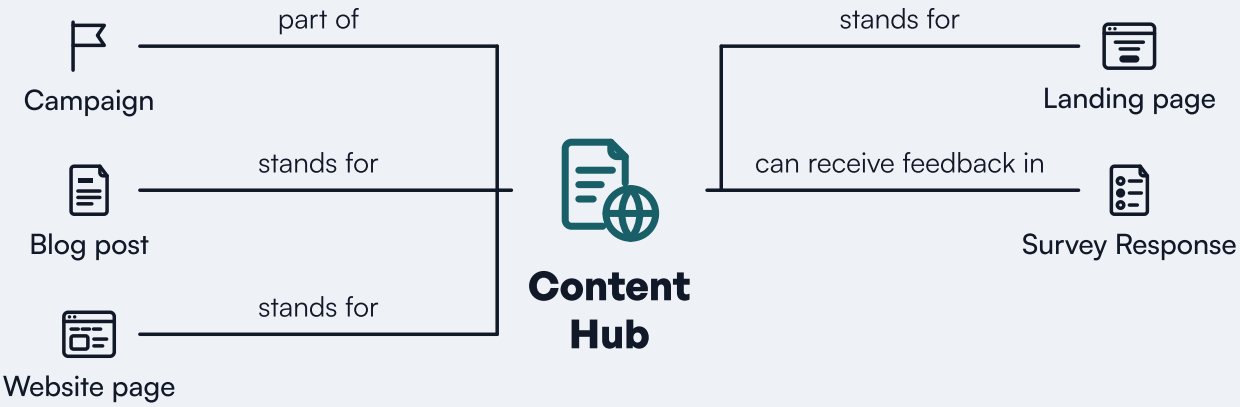
Whose value does it serve?

Value in Context

Those who publish and run campaigns. A Content Hub record shows what has been published and, where one is set, the campaign each piece belongs to, so published work connects to the effort behind it.



What links to Content Hub?



Every link here is HubSpot's own. None reaches a Friend (a HubSpot contact), an Account or an Opportunity.

How does a Content Hub record change?

A Content Hub record moves through no stages. A page or post is either a draft or published, which is HubSpot's publish status, not a path anyone manages. The record follows the act of publishing.

What is Content Hub not?

Not the page itself. The page or post is its own HubSpot record. A Content Hub record is the entry that points at it.

Not Value-First Content. That is our own idea: content that gives real value with no hook. This record shows only that a page or post exists.

Not our record of what we publish. Each show episode is a Listing, linked to the people on it.

Value-First Documentation

Our own custom object in HubSpot

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

Each Documentation record is one written record we keep in HubSpot, linked to what it is about.

HubSpot ships no object like it, so we made this one: written procedures, records of checking them, onboarding records for our AI team and software tool profiles.

Why keep it in HubSpot?

> "... data model documentation in here ... mix the narrative and story of what objects are doing ..."



Chris Carolan, Another Orange Morning, 17 July 2026

Try it in your portal

Record who checked it. Label the link to the contact who checked a record, such as "Checked by". Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

One pipeline per kind. Make one pipeline for each kind of record, as we do for corrections and audits. Settings › Data Management › Objects › your object › Pipelines tab. Enterprise for a custom object.

Keep the version it replaces. Create a pair of labels, "Replaces" and "Replaced by", for links between two records of the same object. Data Model › Edit Data Model › Create association label. Professional or Enterprise; Enterprise for custom objects.

What do we keep about Documentation?

Beyond the usual record details and HubSpot history, we keep:

The written text. The text of the record and its version.

When it was last checked. The date of the last check and the evidence the check cited.

Practice or finding. Whether it is a standing practice we keep current or a dated finding.

Who may see it. Whether it is internal only, cleared for outside use or awaiting redaction.

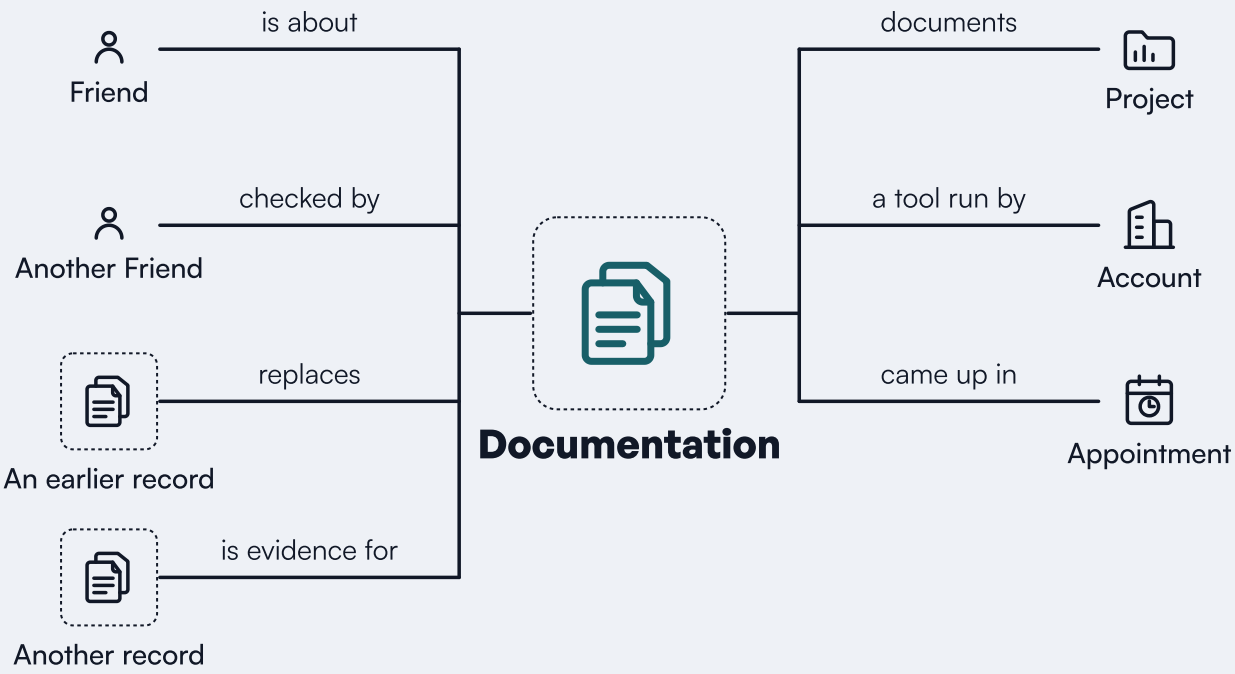
Whose value does it serve?

Value in Context

Value in Context is for the decision, and whoever has to make it. The record keeps the written layer of context in HubSpot, linked to the Friends, projects and accounts it concerns.



What links to Documentation?



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

A newer record replaces an earlier record, and the earlier record stays. Another record links as evidence for the record it backs up.

Also connected, though not drawn: Opportunities, Tickets, Quotes, Orders, Interests and more.

How does Documentation move with us?

Each kind of written record has its own set of stages. Seven of them include a stage named for an independent check. Some records, such as our object profiles, sit on no pipeline.

Value-First Partner Client

Partner Client in HubSpot

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

HubSpot's own record of a customer account it credits us with, as the partner who sold it or manages it.

Only HubSpot Solutions Partners have it, and we use it as HubSpot ships it. HubSpot creates every record: which Account, sold or managed, its start date and, once ended, its end date.

Try it in your portal

Link a client to its Account. Open the record and add its Account in the right sidebar; HubSpot then fills in the record's name and domain from it. CRM › Partner Clients. Needs a Partner Account. Super Admin or Edit associations.

Save a view of past clients. HubSpot clears the relationship type when a relationship ends, so filter on Relationship End Date. CRM › Partner Clients › + add view, set the filter, Publish. Needs a Partner Account. Create CRM views.

Keep your facts on the Account. Every field on ours is HubSpot's, so we keep our own facts on the Account, such as a client's portal ID and hub tiers. Settings › Properties › Company properties › Create property. Any plan. Edit property settings.

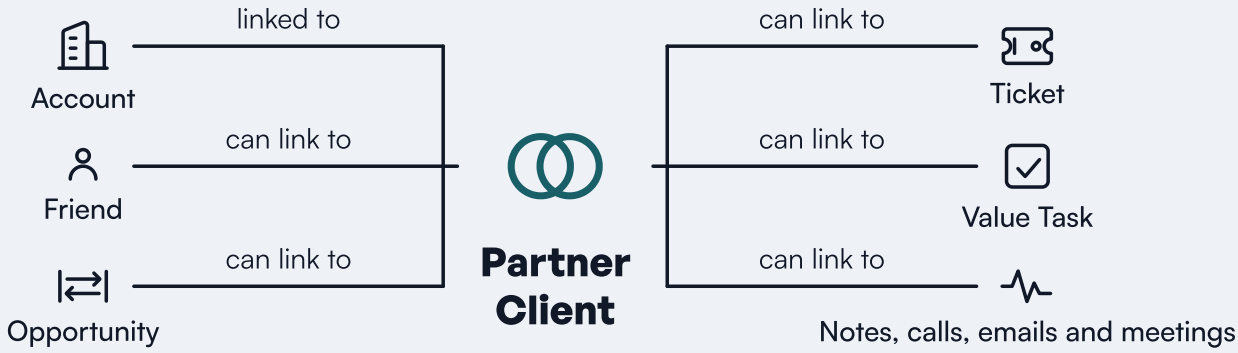
Whose value does it serve?

Value in Context

Whoever has to decide what to do next with a customer. The record can show them that customer's HubSpot setup: what they have, their limits and how much they use HubSpot.



What links to a Partner Client?



Only the link to the Account is in use in our portal.

Also connected, though not drawn: HubSpot's own partner records, partner services and activity shared with HubSpot.

How does a Partner Client change?

It has no stages. HubSpot decides when a record is active: while it lists us as the partner who sold or manages the account. When that relationship ends, HubSpot clears the relationship type and the record turns inactive. The end date stays on the record.

What is a Partner Client not?

Not the list of who we work with. It is HubSpot's statement about one HubSpot account. It does not make anyone a paying customer of ours.

Not our revenue. Any subscription amounts on it are what the customer pays HubSpot.

Not the relationship itself. That lives on the Account, and on the Friend records of the people in it. The record only points at the Account.

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?

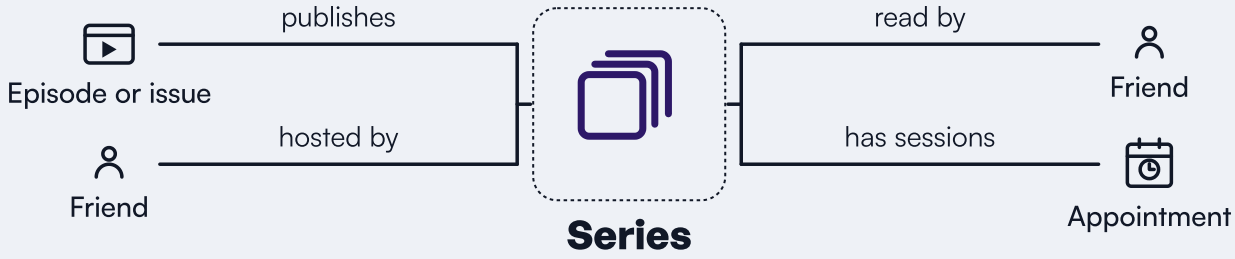
Value for the Community

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.



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

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.

Value-First Card

Our own custom object, not one of HubSpot's CRM cards

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

Each Card record is one card we make: it marks where someone stands with us, or carries one of our ideas.

A person with several roles has a card for each. Other cards carry one of our terms or are played in our game. Our AI members have cards too.

Try it in your portal

Add publishing stages. Make a pipeline from first idea to published and in use, as our cards do, and mark a stage Open when the work never ends. Settings › Data Management › Objects › Pipelines tab. Starter or above; Enterprise for custom objects.

Put the role on the link. Label the link to a show, organization or event with the role, such as Host or Guest, rather than typing it in a field. Data Model › Edit Data Model › Create association label. Professional or Enterprise.

Add a permanent ID. Create a text property that requires unique values, so no two records share an ID. Settings › Properties › Create property › Rules tab. Set it when you create the property. All plans.

What do we keep about a Card?

Beyond the usual record details and HubSpot history, we keep:

The words on the card. Its abilities, one flavor line and, for a term, what it means in our own words.

A public page, or none. Whether the card has a public page of its own.

Whose words they are. Who wrote the words and holds the authority to change them.

The finished card image. The card as an image to download. A person's likeness is read from their Friend record, not stored here.

Whose value does it serve?

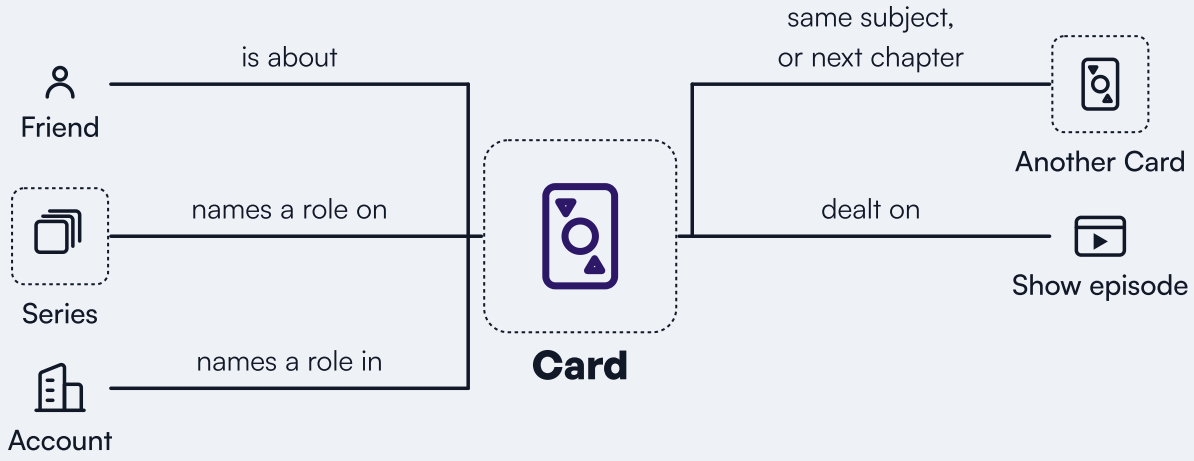
Value for the Community

That means everyone outside the transaction, the people who learn from our work without buying it. A card is handed to those who host, guest and build with us, and shown for anyone to learn from or play with.



What links to a Card?

Value-First Card
Our own custom object, not one of HubSpot's CRM cards



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

A Series is one of our shows. Another Card is a card of the same subject, or the next chapter of a story told across cards.

Also connected, though not drawn: events, where a card names a role such as Insider or Speaker.

How does a Card move with us?

Card Identified	Grounded	Copy & Art Ready	Rendered	Published	Delivered	In Play

A card is never finished: every stage is open, and a card in use is a living state, not an end. This is a publishing motion, set up like the one our episodes follow.

What is a Card not?

Not a person. The person is their Friend record. A card is about them, and one person can have many.

Not an episode. A guest's card names the show. The episode is where it happened.

Not one card whose role changes. Each role is its own card.

Not money. A card carries no amount and books no money.

Value-First Marketing Email

Marketing email in HubSpot

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

One record holds a message we write once and send to many, with its results (opens, clicks, unsubscribes).

We use it as HubSpot ships it, with no fields of our own. Ours are reminders and recaps for member meetups, a weekly client update, and notices that send on their own.

Try it in your portal

Split by subscription type. One subscription type per kind of email, such as members' updates or events, lets readers opt out of one and keep the rest. Settings › Marketing › Email › Subscription Types tab. Marketing Hub Starter, Professional or Enterprise.

Personalize the subject. Click Personalize in the subject line, pick a Company (our Account) property, set a fallback. Ours names the week each client's update covers. Marketing › Email › Subject line. All plans; automated emails need Starter or above.

Put emails in a campaign. Create a campaign, then choose it in the email's setup, so results sit with the posts and pages that share its purpose. Marketing › Campaigns › Create campaign. Marketing Hub Professional or Enterprise.

What do we keep about a Marketing Email?

What is ours is how we fill HubSpot's fields:

A person as the sender. Most of what we sent this year went out under a named person's name, not the team's.

Whose value does it serve?

Value for the Community

This serves the whole team and the community around it. The record shows everyone what we send, what is still a draft, and what goes out on its own without anyone pressing send.



What links to a Marketing Email?



No record link to the contacts who got it. Also connected, not drawn: test versions, feedback surveys, HubSpot's reporting records.

How does a Marketing Email change?

It has no stages. Draft, scheduled or sent is a status, not a path, and an automated email sends whenever its trigger fires. After it goes out, it keeps what came back: deliveries, opens, clicks, replies and unsubscribes.

What is a Marketing Email not?

Not a one-to-one email. HubSpot keeps the emails one person sends another as a separate object. A marketing email is one message sent to many.

Not proof that value landed. An open or a click does not show the reader received anything of worth. Value counts when the one who received it accepts it.

Not a campaign. A campaign gathers the emails, posts and pages that share one purpose. The email is one piece inside it.

Value-First Workflow

Workflow in HubSpot

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

HubSpot stores each automation you build as a Workflow: its name, whether it is on, and what it enrolls.

We use Workflow as HubSpot ships it, with no fields of our own. Of our workflows that are on, most enroll Friends, appointments or tickets.

Before you turn one on?

> "... broken processes create broken automation. ... spend five minutes thinking about this."
>
> Trisha Merriam, Another Orange Morning, 29 October 2026

Try it in your portal

Alert on a quiet spell. Enroll records whose date is more than 60 days ago, with an internal email to a teammate and re-enrollment on. Leave out records with no date. Automation › Workflows › Create workflow. Professional or Enterprise.

Remind three times, then stop. Alert the team when a ticket has waited 7 days in a stage. Add a 7-day delay and a branch: still waiting, alert at 14 days, then 21, and stop. Automation › Workflows. Professional or Enterprise.

Say what it does. Before you turn a workflow on, describe what it does, who it reaches, why, and who built it. Leave it blank and HubSpot writes one with AI. Review and publish › Edit. Professional or Enterprise.

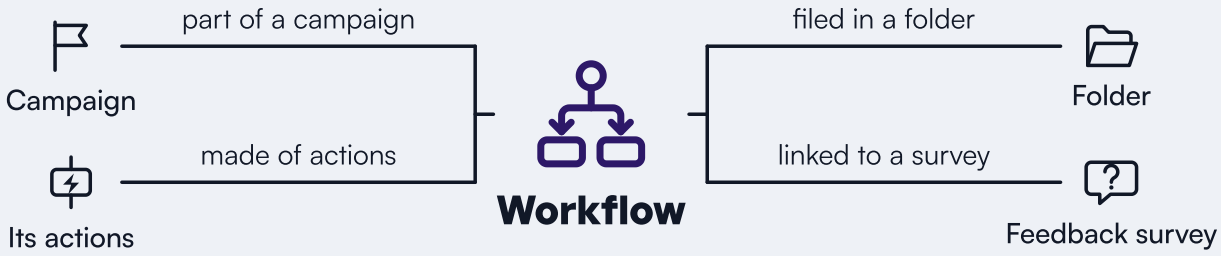
Whose value does it serve?

Value for the Community

Workflows carry routine coordination so people can do the work that needs them. They gather, route and record; people read and decide.



What links to a Workflow?



How does a Workflow change?

A Workflow has no stages, and HubSpot offers it no pipeline. It is on or off, and that is the whole change.

What is a Workflow not?

Not the records it acts on. A workflow enrolls Friends, tickets or appointments. It is not linked to them.

Not where to start. Make the work visible first, then decide what needs a workflow.

Not the decision. Workflows gather, route and record. People read and decide.

Value-First User

User in HubSpot

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

Each User record is one seat in the portal, with the access that comes with it.

We use User as HubSpot ships it, adding nothing of our own. A person's Friend record stays separate.

What does it tell you?

> "This view starts to get very, very close to a job description."
>
> Chris Carolan, Another Orange Morning, 3 November 2026

Try it in your portal

Read someone's access. See a user's seat and permissions without opening the editor, to check what each person can do. Settings › Users & Teams › the user › Access tab. All plans.

Name a countersigner. Have one named person on your team countersign quotes alongside the buyer. Quote editor › acceptance module › Countersigners. Revenue Hub Professional or Enterprise. Needs a Revenue Hub seat to make the quote.

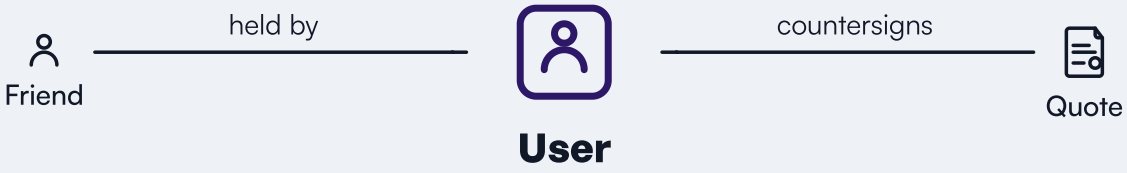
Whose value does it serve?

Value for the Community

That means everyone outside the transaction. Here, the record holds the access that lets each person do their part of the work in the shared system.



What links to a User?



A seat can be taken back without ending a relationship, so we keep a person's user record and Friend record separate and link them.

HubSpot can also link a user to opportunities, accounts, tickets, projects and more; we use none of those links.

How does a User change?

A user record does not move through stages. Deactivating it switches the seat off but keeps the record, and HubSpot works out an invite status for it. A person's place on the Value Path is on their Friend record, not here.

What is a User not?

Not only people. Many user records are connected apps or HubSpot's own AI agents, with nobody signing in.

Not where our AI team members live. They have Friend records and, today, no user records.

Not a record of someone we serve. It holds who can work in the portal, never our relationship with a person we help.

Value-First Event

Our own custom object, now retired

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

An Event record held one session from our workshop catalog: what it taught, who it was for, who taught it.

Each record was one session, such as a workshop, roundtable or keynote. In May 2026 we retired the object and moved its 74 workshops to HubSpot's marketing events.

Try it in your portal

Try marketing events first. Before building a workshop object, use marketing events: once people arrive by import, workflow or app, HubSpot counts who registered, canceled and attended. Marketing › Events › Create marketing event. Any plan.

Say who each session is for. Add a dropdown to your marketing events listing the stages people move through with you, plus General. Settings › Properties › choose the object › Create property, field type Dropdown select.

Share one subject list. Give your marketing events and your other objects the same subject dropdown, as our workshops and shows share ten subjects. Settings › Properties › choose each object › Create property, Dropdown select.

What did we keep about an Event?

Beyond HubSpot's own fields, an Event record held:

Its subject. One of ten subjects, the same ten our shows use.

Who it was for. The stage of readiness it was meant for, and how deep it went: general, technical or strategic.

Format and access. A roundtable, workshop, keynote, interview, commentary or bootcamp; open to the public or to members.

Its teacher. Linked to the teacher's contact record, with key points, price and start time.

Whose value does it serve?

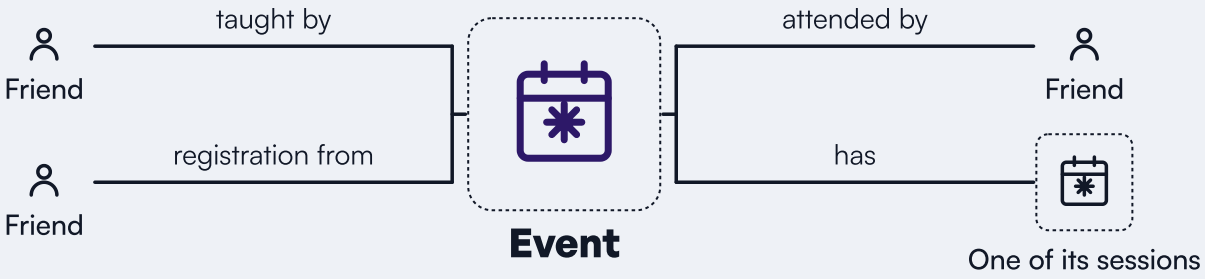
Value for the Community

Value for the Community is everyone outside the transaction: the field, the people who learn from the work without buying it. Each session said what it taught and who it was for.



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

What links to an Event?



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

Only the teacher link is filled on our records; the others went unused. “One of its sessions” is another Event, shown dashed.

Also connected, never used: our own investment and deliverable objects, line items, tasks, and HubSpot’s notes, calls, emails and meetings.

How does an Event change?

An Event record did not move through stages. Its Stage property said who a session was for, not where the session stood in any process.

What is an Event not?

Not HubSpot’s marketing event. That is where our workshops live now.

Not a record of who came. It was built to hold registration and attendance, and no record ever did.

Not an Appointment. An Appointment holds a gathering’s time; an Event held a session in the catalog.