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.

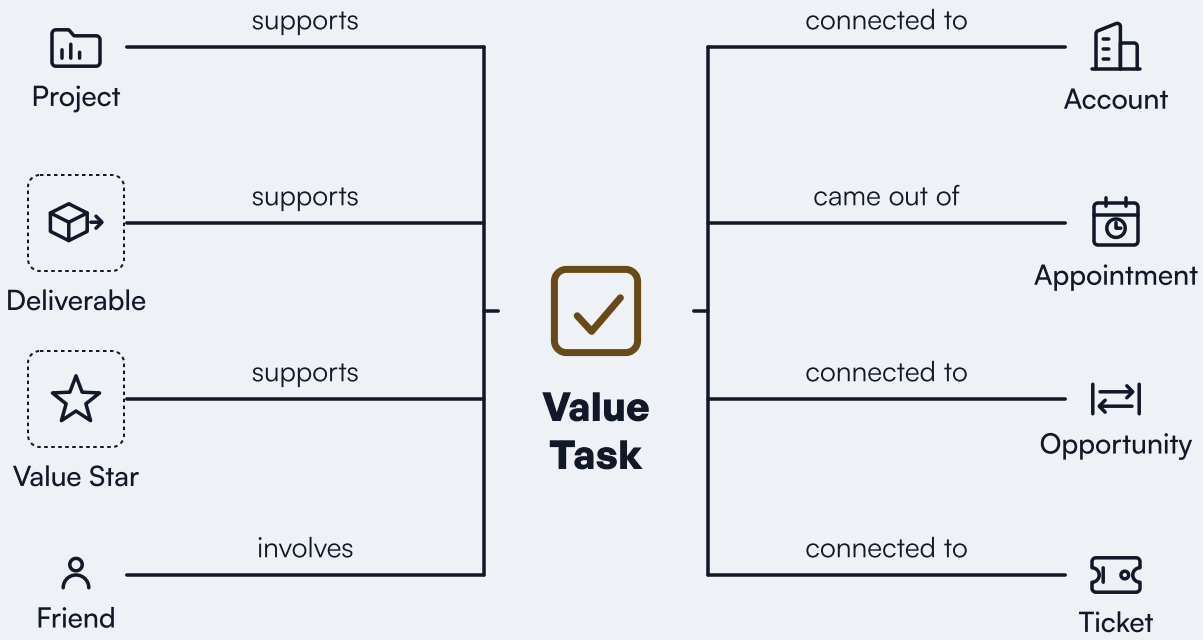
Whose value does it serve?

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.