

HubSpot and Jobber quote pipeline for a landscaping and hardscaping business

How I'd approach a Melbourne landscaping and hardscaping business that gets enquiries from six sources, tracks them in HubSpot and quotes in Jobber, so that every enquiry has a deal, every quote is linked to its deal, and the owner can see what each lead source actually brings in.

HubSpot

Jobber

Zapier

AREA

Sales pipeline and quoting

TOOLS

HubSpot · Jobber · Zapier

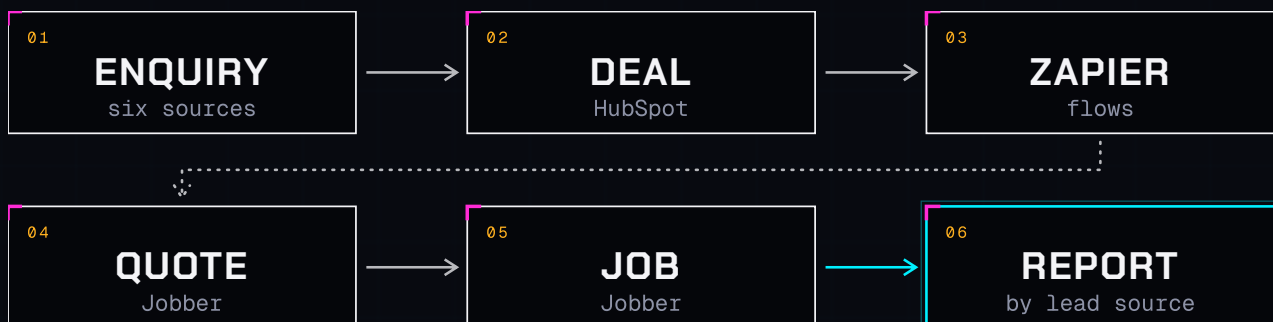
TYPICAL SCOPE

US\$2,000–3,500

TIMELINE

About 6 weeks, 4 milestones

DATA FLOW



Work sample: realistic data, not a past client job. Amounts are in AUD and GST is 10%.

01 The problem

A landscaping and hardscaping business gets enquiries from Google ads, Facebook and Instagram, its website form, referrals, a lead marketplace and repeat customers. The leads go into HubSpot. The quotes are written in Jobber, because that is where the site visits, jobs and invoices live. The two systems do not talk, so the status of a quote is whatever somebody last typed into HubSpot.

Owners usually notice it like this:

- A lead has a site visit and then nothing happens, because the quote never gets written
- HubSpot says a deal is won but there is no job in Jobber, or the other way round
- Nobody can say which lead source produces jobs rather than just enquiries
- The same customer is in HubSpot twice, once by phone number and once by email

In this sample, over 12 months (October 2025 to September 2026) there were **1,500 deals** and **1,100 Jobber quotes**. **120 deals** reached the site visit stage and never got a quote. **41 deals** had no owner. **23 deals** were marked won in HubSpot with no job in Jobber, and **212 quotes** had a status in HubSpot that did not match Jobber.

02 The outcome

This is what the setup does and delivers:

- A single stage map that says what each HubSpot stage means in Jobber, agreed with the owner and the estimators
- Zapier flows that create the Jobber client and request when a site visit is booked, then write the quote number, amount, status and job number back to the HubSpot deal as the quote moves through Jobber
- Contact matching rules that look for an existing contact by email, then by phone, before anything is created
- Every deal has an owner, assigned by rule
- A weekly list of deals at the quote stage with no quote, and of quotes waiting too long for a reply
- A win-rate view by lead source, by job type and by month
- A one-page routine for the estimators and one for the office

03 Scope

EXHIBIT A Scope

DELIVERABLE	WHAT'S INCLUDED	NOTES
Health check of leads and quotes	Review of a recent export from HubSpot and from Jobber, the current stages, lead sources and contact records; findings, risk list and a fixed quote	US\$300, and the findings are yours to keep. If the findings change the plan, I re-quote before M2
Pipeline and stage map	HubSpot deal stages, required properties, lost reasons, and a one-page map of what each stage means in Jobber	Agreed with the owner and estimators in M1

DELIVERABLE	WHAT'S INCLUDED	NOTES
Zapier flows	Flows between HubSpot and Jobber for client and request creation, quote created, quote sent, quote approved and job created	Jobber triggers used: New Quote Created, Quote Sent, Quote Approved, New Job Created. Jobber does not offer a trigger for a quote that is declined or sent back for changes
Contact and duplicate rules	Matching by email, then phone, then name and suburb (for review only); clean-up of existing duplicates	Merges are reviewed by a person before they are done
Owner assignment and follow-up	Owner by rule, a task when a deal has sat at the quote stage with no quote, and a follow-up task when a quote has had no reply	Built as HubSpot workflows, so they do not depend on Jobber. Rotating owners needs a HubSpot plan that supports it; otherwise the Zap assigns the owner
Lead source reporting	HubSpot report or a Google Sheet showing deals, quotes, win rate and won value by source	Based on quotes marked won or lost, with open quotes shown separately
SOPs and handover	One-page routines for estimators and the office; recorded walkthrough	Written to match how the team already works
Not included	A website rebuild, ad management, invoicing or accounting set-up, and Jobber features outside quotes and jobs	Zapier and HubSpot plan costs are the business's own. Jobber's Zapier link is available on certain Jobber plans, which I check in M1

Not included: payroll, STP or BAS lodgement.

EXHIBIT B Sample data

ITEM	VOLUME
Period	12 months to 30 September 2026
Deals in HubSpot	1,500
Lead sources	6
Jobber quotes	1,100 (\$19,501,750 ex GST)
Deals with a site visit but no quote	120
Deals with no owner (old process)	41
Duplicate contact pairs (old process)	63
Test month	September 2026, 157 deals, 180 quote events

04 Walkthrough

4.1 THE STAGE MAP

Each HubSpot deal stage means something specific in Jobber, and the rules are written on one page so the office and the estimators work to the same picture.

HUBSPOT STAGE	WHAT IT MEANS	JOBBER EVENT	HOW IT MOVES
New enquiry	Lead received, not yet contacted	None	Created when the enquiry arrives
Site visit booked	A visit is booked	Client and request created	HubSpot to Jobber, by Zap
Quote being prepared	Quote started	New Quote Created	Jobber to HubSpot, by Zap
Quote sent	Quote with the customer	Quote Sent	Jobber to HubSpot, by Zap
Quote approved	Customer accepted	Quote Approved	Jobber to HubSpot, by Zap
Won, job booked	A Jobber job exists	New Job Created	Jobber to HubSpot, by Zap
Lost before quote	Closed before quoting	None	Set in HubSpot with a lost reason

HUBSPOT STAGE	WHAT IT MEANS	JOBBER EVENT	HOW IT MOVES
Lost after quote	Quote not accepted	None	Set in HubSpot with a lost reason; the quote is archived in Jobber by the office

Lost deals are handled by people, not by a trigger. The Jobber link has no trigger for a declined quote or a quote sent back for changes, so a lost reason is required in HubSpot, and a weekly list shows any quote that has been waiting for a reply for more than 45 days so it can be closed in both systems.

4.2 ZAPIER FLOWS

#	STARTS WHEN	WHAT IT DOES	NOTES
1	Enquiry arrives (website form, lead form, phone entry)	Find or create the contact (email, then phone), create the deal with source and owner	HubSpot duplicates are prevented by the matching rules in 4.3
2	Deal enters Site visit booked	Find or create the Jobber client, create a Jobber request with the deal ID in the title, add a note to the request with the deal ID, write the Jobber client ID to the deal	The request is created on the client's first property in Jobber. Clients with several properties are checked by the estimator
3	New Quote Created in Jobber	Read the deal ID from the start of the quote title, move the deal to Quote being prepared, write the quote number	If no deal ID is found, the quote is matched by Jobber client ID; if that fails, it goes on a needs-matching list
4	Quote Sent	Move to Quote sent, set the amount (ex GST) and the quote status	
5	Quote Approved	Move to Quote approved	
6	New Job Created	Match the job to the open approved deal for that client, write the job number, move to Won, job booked and set the close date	

How a quote finds its deal: the quote title in Jobber begins with the HubSpot deal ID, for example "[HS 412320461] Retaining wall, Essendon". The deal ID is also written as a note on the Jobber request, so a person can find it. The Zap reads the ID from the title. I do not rely on a feature that carries the deal ID from the request into the quote on its own, so the first month is checked closely.

4.3 CONTACT AND DUPLICATE RULES

ORDER	RULE	EXAMPLE
1	Match on email, lower-cased and trimmed	The same email typed with capitals and in lower case is one contact
2	If no email, match on phone, formatted to the international format	The same mobile written with and without the country code is one contact
3	If still no match, create the contact	
4	Same name and suburb with a different phone	Not merged by a Zap. Listed for review

Existing duplicates are cleaned up in M2. In the sample, 63 pairs were found:

MATCH TYPE	PAIRS
Mobile number in different formats (with and without the country code)	27
Email with different capitals or a typo	21
Same name and suburb, different phone	15
Total	63

4.4 FIELD MAPPING

HUBSPOT DEAL PROPERTY	JOBBER FIELD	DIRECTION
Deal name	Request and quote title (starts with deal ID)	HubSpot to Jobber
Deal ID	Quote title and request note	HubSpot to Jobber

HUBSPOT DEAL PROPERTY	JOBBER FIELD	DIRECTION
Jobber client ID (custom)	Client	HubSpot to Jobber
Jobber quote number (custom)	Quote number	Jobber to HubSpot
Amount (ex GST)	Quote total, with GST taken out in the Zap	Jobber to HubSpot
Jobber quote status (custom)	Draft, Awaiting response, Approved	Jobber to HubSpot
Jobber job number (custom)	Job number	Jobber to HubSpot
Close date	Job created date	Jobber to HubSpot
Lost reason	Not synced	Entered in HubSpot
Lead source	Not synced	Entered in HubSpot, from the form or the person who takes the call
Deal owner	Not synced	Assigned by rule in HubSpot

4.5 ONE DEAL FROM ENQUIRY TO JOB

Take **Retaining wall, Essendon**, a referral lead for \$14,600.00 ex GST (\$1,460.00 GST, \$16,060.00 inc GST).

DATE	STEP	SYSTEM	WHAT HAPPENS
02 Feb 2026	Enquiry received	HubSpot	Contact found or created by email, then phone. Deal created in New enquiry with source Referral and the owner by rule
03 Feb 2026	Site visit booked	HubSpot to Jobber	Zap finds or creates the Jobber client, creates a request titled "[HS 412320461] Retaining wall, Essendon", and adds a note to the request with the deal ID
03 Feb 2026	Quote created in Jobber	Jobber to HubSpot	Quote Q-1585 is created with the deal ID at the start of its title; the deal moves to Quote being prepared
04 Feb 2026	Quote sent	Jobber to HubSpot	Deal moves to Quote sent; amount set to \$14,600.00 ex GST; quote status set to Awaiting response
22 Feb 2026	Quote approved	Jobber to HubSpot	Deal moves to Quote approved
23 Feb 2026	Job created	Jobber to HubSpot	Job JOB-3148 is written back; deal moves to Won, job booked and the close date is set

4.6 THE FUNNEL AND THE SOURCES

STEP	DEALS
Deals created	1,500
Closed before a quote (not qualified or no response)	280
Reached the quote stage	1,220
Quote stage but no quote in Jobber	120
Jobber quotes	1,100
Won, job booked	387
Lost after quote	592
Still open at 30 September 2026	121

Of the 280 deals closed before a quote, 82 were out of the service area, 74 did not respond, 66 had a budget that was too low and 58 were DIY or not proceeding. Of the 592 quotes that were lost, 134 chose another quote on price, 141 postponed, 166 did not respond to follow-up and 151 changed scope.

Win rate is the quotes won divided by quotes won or lost, so open quotes do not distort it.

LEAD SOURCE	DEALS	WITH A QUOTE	WON	LOST	WIN RATE	WON VALUE (EX GST)	AVG DAYS TO QUOTE
Google Ads	420	294	90	175	34.0%	\$1,525,200	8.1

LEAD SOURCE	DEALS	WITH A QUOTE	WON	LOST	WIN RATE	WON VALUE (EX GST)	AVG DAYS TO QUOTE
Website form	330	251	95	132	41.9%	\$1,909,450	7.7
Facebook and Instagram	255	169	38	109	25.9%	\$645,650	7.8
Referral	225	198	99	74	57.2%	\$1,837,600	3.3
Marketplace leads	180	111	21	77	21.4%	\$313,150	7.8
Repeat customer	90	77	44	25	63.8%	\$780,550	3.4
Total	1,500	1,100	387	592	39.5%	\$7,011,600	6.7

By month:

MONTH CREATED	DEALS	WITH A QUOTE	WON	WON VALUE (EX GST)
Oct 2025	159	120	40	\$766,550
Nov 2025	143	104	45	\$880,550
Dec 2025	138	95	37	\$717,200
Jan 2026	109	78	27	\$450,200
Feb 2026	125	91	31	\$552,400
Mar 2026	139	100	33	\$628,100
Apr 2026	132	93	37	\$689,250
May 2026	101	65	32	\$583,900
Jun 2026	86	60	25	\$362,400
Jul 2026	100	81	36	\$616,400
Aug 2026	111	86	29	\$474,500
Sep 2026	157	127	15	\$290,150
Total	1,500	1,100	387	\$7,011,600

The 387 won deals total \$7,011,600.00 ex GST, \$701,160.00 GST and \$7,712,760.00 inc GST.

4.7 TEST MONTH (SEPTEMBER 2026)

One month runs through the new flows before handover. For each quote event in Jobber (quote sent, approved, job created), the time in Jobber is compared with the time the HubSpot deal was updated:

JOBBER EVENT	EVENTS
Job created	29
Quote approved	29
Quote sent	122
Total	180

The longest delay was **13 minutes** and the average was 7.0 minutes. The target is 15 minutes or less, which depends on the Zapier plan's polling interval, so I confirm it in M1. The full log is in sync_log_sep_2026.csv.

05 Checks

EXHIBIT C Checks on the sample data

CHECK	BEFORE (DEALS CREATED OCT TO AUG)	AFTER (TEST MONTH, SEP)	STATUS
Every deal at the quote stage has a Jobber quote	973 of 1,093 deals	127 of 127 deals past the site visit stage	PASS
Every won deal has a Jobber job	349 of 372 won deals	29 of 29 jobs written back to their deal	PASS
Quote status in HubSpot = Jobber, within 15 minutes	761 of 973 quotes in step	180 of 180 events, longest 13 minutes	PASS
Every deal has an owner	1,302 of 1,343 deals	157 of 157 deals	PASS
No new duplicate contacts	63 pairs found	0 new pairs	PASS

The 41 deals with no owner before the fix are the ones marked "no owner" in the old_process_issue column; the deal_owner column shows the owner assigned after the clean-up.

06 Milestones

EXHIBIT D Milestones

MILESTONE	WHAT HAPPENS	ROUGH DURATION	WHAT IS SIGNED OFF	SHARE
M1 · Health check and stage map	Health check (US\$300), a review of HubSpot and Jobber exports, stage map, lost reasons and matching rules agreed	About 1.5 weeks	Findings, stage map and fixed quote	25%
M2 · Flows built	HubSpot properties and stages, the six Zapier flows, owner assignment, duplicate clean-up, the weekly lists	About 2.5 weeks	A test enquiry taken through to a job and a won deal	40%
M3 · Test month	A month of live enquiries run through the new flows, checks reviewed, win rate by source report built	About 1.5 weeks, plus the month running	The five checks pass and the first source report is reviewed	25%
M4 · Handover	SOPs, walkthrough recording and a short review	About 0.5 week	Owner and estimators confirm they can run it	10%

The fixed quote follows the US\$300 health check, so the price is based on what is actually in your files. If the health check changes the plan, I re-quote before M2.

Typical scope for this kind of project: US\$2,000–3,500.

07 Handover

- A one-page stage map
- The six Zapier flows, documented, with the matching rules
- HubSpot workflows for owner, no-quote and follow-up tasks
- A weekly list of quotes to close out in both systems
- A lead source report
- One-page routines for estimators and the office

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- A recorded walkthrough
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- Prepared by Manaz Afzal
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08 Files

FILE	WHAT IT IS
hubspot_deals.csv	1,500 deals with source, owner, stage, amount, Jobber quote and job, and the issues in the old process
jobber_quotes.csv	1,100 quotes with deal ID in the title, status, GST and totals
sync_log_sep_2026.csv	180 quote events in the test month with the delay in minutes
contact_duplicates_before.csv	63 duplicate contact pairs and the action for each