

4R — Sales Setter

Role:	Setter
Department:	Sales
Reports To:	Sales Leadership
Status:	Full-Time Growth Role
Location:	Remote
Date Updated:	October 5, 2026

Compensation & Schedule

Full-time:	40 hours/week
Schedule:	8am–12pm, 4–8pm CST
Compensation:	\$1,000 Monthly Base + 5% commission based on clients enrolled
Location:	Remote

Role

The Sales Setter owns the front end of the Broads sales pipeline.

Your primary responsibility is to start and manage conversations with prospective clients, identify women who are a strong fit for Broads, and confidently guide qualified leads toward booking and showing up for a Clarity Call with our sales team.

This is not a customer service role, a copy-and-paste DM role, or a “send as many messages as possible” role.

You are responsible for creating qualified sales opportunities.

You are often the first real human interaction someone has with Broads. How you communicate should reflect who we are: direct, curious, knowledgeable, supportive, and confident.

You also own the accuracy of your portion of the CRM. If a lead is in conversation with us, we should know where she stands, what happens next, and when she needs to be followed up with.

Your job is to move the right women forward and keep the pipeline moving.

Results

Primary Result

Consistently generate qualified Clarity Calls that HOLD.

The goal is not simply to book calls. The goal is to create enough high-quality conversations that the right women book calls, understand why they are taking the call, and actually show up.

Your performance is ultimately measured by qualified calls held.

Sales Pipeline Results

You are responsible for:

- Starting new conversations with qualified prospects every working day.
- Responding quickly to inbound leads and high-intent engagement.
- Moving active conversations forward instead of allowing them to stall.
- Following the Broads DM framework to uncover goals, problems, urgency, and readiness.
- Identifying when someone is qualified for a Clarity Call.
- Confidently proposing the call when appropriate.
- Following up with leads who expressed interest but did not book.
- Supporting booked prospects through the handoff so they understand what happens next.
- Reducing avoidable cancellations and no-shows.
- Re-engaging warm leads according to the follow-up SOP.
- Prioritizing Active Conversations → Follow-Ups → New Outreach.

CRM Results

The CRM is part of the job, not administrative work you get to later. You are expected to be highly proficient in the Broads CRM and maintain accurate pipeline data in real time.

Every active lead should have:

- Correct contact information
- Correct pipeline stage/status
- Appropriate tags
- Relevant conversation notes
- Qualification information
- Last contact documented
- Next action identified
- Follow-up date/task when applicable
- Call status accurately recorded

If it isn't in the CRM, it didn't happen.

Leadership should be able to open the CRM at any time and understand exactly what is happening in the pipeline without asking you to reconstruct it.

Performance Results

Performance will be evaluated using metrics including:

- New conversations started
- Response rate
- Active conversations
- Follow-ups completed
- Qualified prospects identified
- Calls proposed
- Calls booked
- Qualified calls held
- Booking → held rate
- Setter-sourced revenue / clients
- CRM accuracy and completion
- Speed to lead / response time

Activity matters, but activity without outcomes is not success. We care about conversations that turn into qualified opportunities.

Responsibilities

Daily Pipeline Management

Every working day, you are responsible for:

1. Reviewing the CRM and identifying your priorities for the day.
2. Responding to all new inbound leads and messages.
3. Working active conversations first.
4. Completing scheduled follow-ups.
5. Starting new outbound conversations using approved Broads messaging.
6. Qualifying leads according to the Lead Qualification SOP.
7. Proposing and booking Clarity Calls when appropriate.
8. Ensuring booked leads complete the appropriate pre-call steps.
9. Updating the CRM as conversations happen; pipeline hygiene is essential to our data.
10. Flagging high-intent, unusual, or stuck conversations to the appropriate team member.
11. Reviewing your numbers and ensuring daily activity is on pace with weekly targets.

Conversation Ownership

You are expected to:

- Build genuine conversations rather than interrogating leads.
- Ask strong follow-up questions instead of jumping immediately to a call.
- Understand what a prospect actually wants.
- Identify the gap between where she is and where she wants to be.
- Understand what she has already tried.
- Determine whether Broads can legitimately help her.
- Recognize buying signals and act on them.
- Lead instead of waiting for the prospect to tell you what to do next.
- Know when not to book someone.
- Follow up confidently without becoming pushy, needy, or apologetic.

We do not convince women they have problems. We help women who already want something different determine whether Broads is the right next step.

Call Booking & Handoff

When a prospect is qualified, you own the transition from DM conversation to sales conversation. That means:

- Clearly explaining why a call makes sense.
- Sending the correct booking link.
- Following up if the link is sent but the call is not booked.
- Confirming the CRM reflects the booking.
- Making sure relevant context is documented for the sales team.
- Supporting pre-call compliance according to SOP.
- Following up on cancellations or reschedules when appropriate.

The closer should enter the call already understanding who this woman is, what she wants, why she reached out, and what is getting in her way.

CRM Ownership

You are responsible for maintaining a clean, usable CRM. This includes:

- Updating stages immediately.
- Recording meaningful notes.
- Creating follow-up tasks.
- Preventing leads from falling through the cracks.
- Identifying stale leads.
- Correcting inaccurate or incomplete records.
- Following naming, tagging, and pipeline conventions.
- Maintaining accurate reporting.

CRM proficiency is a core competency of this position.

Communication & Collaboration

You will:

- Participate in sales meetings and trainings.
- Bring stuck conversations to the team instead of spinning on them alone.
- Submit conversations for review and coaching.
- Communicate important lead context to the closer.
- Flag patterns you are seeing in objections, messaging, lead quality, or audience response.
- Communicate immediately if something in the CRM, automation, booking process, or sales funnel appears broken.
- Receive feedback without defensiveness and implement it quickly.

Requirements

To succeed in this role, you must be:

Sales-Minded

You understand that the goal of conversation is movement. You can build rapport without chatting endlessly, ask direct questions without sounding robotic, and recognize when someone is ready for the next step.

Highly Organized

You can manage a large number of simultaneous conversations without losing track of who needs what. Follow-up cannot depend on your memory.

CRM Proficient

You are comfortable learning and working inside a CRM every day. You understand pipeline stages, tasks, notes, tags, lead statuses, reporting, and follow-up management.

An Excellent Written Communicator

You can communicate naturally through DMs while maintaining the Broads voice. You do not rely on scripts so heavily that you sound like a bot.

Coachable

You will receive feedback on your conversations. The expectation is not perfection. The expectation is that feedback gets implemented.

Metrics-Driven

You know your numbers. You should always be able to answer:

- How many conversations am I managing?
- How many qualified opportunities am I creating?
- How many calls am I booking?
- How many are actually holding?
- Where is the pipeline getting stuck?

Proactive

You do not wait for someone to tell you there are leads sitting untouched, follow-ups overdue, or CRM records incomplete. You see it and handle it.

Role Standards

At Broads, we:

- Lead with confidence.
- Speak with women, not at them.
- Assume agency and intelligence.
- Ask instead of assume.
- Tell the truth instead of manufacturing urgency.
- Do not pressure.
- Do not chase.
- Do not beg someone to book.
- Do not manipulate pain.
- Do not promise outcomes we cannot guarantee.
- Do not diagnose medical conditions or give coaching outside the setter's scope.
- Do not freelance our own sales process.

We use the system, measure what happens, and improve from data.

Core Values

Take Up Space — *Flipping societal norms.*

We help women stop making themselves smaller—in the gym and in their lives. Your conversations should reinforce agency, capability, and choice.

We Give a Fuck — *Because it really is that deep.*

We care about the woman on the other side of the DM. She is not a lead number. We pay attention, remember what she tells us, follow through, and do what we said we would do. High intention. Low attachment.

BROADS Cult Mentality — *If you know, you know.*

Protect the culture. Learn how we communicate, understand what makes Broads different, and make people feel that difference from their first conversation with us.

Jacked & Nerdy — *More muscle, less misinformation.*

Know the offer. Know the Broads Framework. Understand enough about our philosophy to communicate intelligently and accurately.

This Should Be Fun — *Intentional & imperfect.*

Sales can be challenging without being miserable. Bring energy, curiosity, personality, and a willingness to experiment while still following the process.

Rating

Performance will be evaluated based on both results and execution.

Green Winning	<ul style="list-style-type: none">• Consistently hitting or exceeding qualified calls-held targets• Strong booking-to-held rate• Healthy conversation volume• Follow-ups completed consistently• CRM is accurate and current• Strong lead qualification• Clean handoffs to the closer• Implements feedback quickly• Communicates proactively with the team
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Yellow Needs Attention	<ul style="list-style-type: none">• Activity is happening but calls-held target is inconsistent• Conversations regularly stall• Follow-ups are missed or delayed• Calls are booked but frequently cancel/no-show• Qualification needs improvement• CRM updates are inconsistent• Requires repeated reminders or direction• Feedback is understood but not consistently implemented
Red Not Meeting Role Expectations	<ul style="list-style-type: none">• Consistently missing calls-held expectations• Insufficient conversation volume• Booking unqualified prospects to inflate numbers• Leads regularly fall through the cracks• Poor or inconsistent follow-up• CRM is inaccurate or significantly behind• Repeated failure to follow the sales process• Poor communication with the sales team• Same coaching feedback continues without improvement

The Standard

You are not here to simply send DMs. You are here to create opportunities.

Every day, you should know:

- Who needs a response?
- Who needs a follow-up?
- Who is ready for a call?
- Who isn't qualified?
- Who booked?
- Who actually showed?
- What does the CRM say?
- What do my numbers tell me?

That is the job.

The best setter at Broads is not the person who sends the most messages. It is the person who can consistently turn genuine conversations into qualified calls that hold, while making every woman she speaks with feel respected, understood, and powerfully led.