

ATTRACT | SELECT | KEEP

LEARNING SERIES



Hosted By: **Robert A. Dougan, M.A.**
President | Founder of [RAD Potential Advisory](#)

TRAINING OVERVIEW:

Great Financial Advisors aren't born. They're attracted, selected, and coached to win!

This special learning series is designed for field managers of the FFMA. This four-part virtual series explores industry trends in attracting, selecting, developing, and retaining top performers. We'll provide our audience with practical tips and data-driven insights on what it takes to build a winning team.

SAVE THE DATE

Module 1. *Attraction* (February 12, 2026: 1pm EST)

Turn Recruiting into a Talent Attraction Engine

- Why does your digital presence matter?
- Who is your audience and where to find them?
- How do you build your network?
- How do you build COI's in your recruitment funnel.

(Special Guest: James Cooper, Founder of [Convoboss](#))

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Module 2. *Artificial Intelligence* (May 28, 2026: 1pm EST)

AI and the New Recruiting Technology Landscape

- Understand the recruiting technology marketplace.
- What is the best use of AI in recruitment?
- The art and science for leveraging talent technology (Efficiency vs. Effectiveness)

(Special Guest: Prakhar Agrawal, Founder of [Senseloaf AI](#))

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Module 3. *Selection* (August 13, 2026: 1pm EST)

The Art and Science of Selecting Top Advisor/Agent

- Learn the core traits driving performance and retention.
- The difference between screening and selection.
- Talent intelligence: What are the strongest predictors?
- What is success formula for selecting top advisors?

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Module 4. *Coaching* (November 19, 2026: 1pm EST)

Coaching With Impact To Drive Results:

- Why you need standards: managing vs. coaching.
- Spending coaching time with the right people.
- Gaining commitment in the coaching process.
- Learn a 4-step coaching system to drive results.

CONTACT US

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Presenter Biographies



Robert Dougan

Founder of [RAD Potential Advisory](#)

Host of the Learning Series: Robert A. Dougan (i.e., R.A.D) is the President and CEO of RAD Potential Advisory Inc. Over the past two plus decades, Robert has consulted and worked closely with senior executives from some of the largest Banks, Investment firms and Insurance companies from across North America and other parts of the world. Over the last 2 decades, he has guided over 270+ organizations, helping them improve advisor productivity and retention through effective talent selection and coaching using data analytics and development strategies.



James Cooper

Founder & Principal Consultant, [Convoboss](#)

Special Guest Speaker: James Cooper is the founder of Convoboss, an AI-Powered Marketing Operating System. He specializes in building "attraction engines" that help businesses find the right customers, and today he'll show you how to apply these same AI-powered principles to turn your recruiting into a talent magnet.



Prakhar Agrawal

Founder of [Senseloaf AI](#)

Special Guest Speaker: Prakhar Agrawal is the Founder and CEO of Senseloaf AI (also known as Senseloaf Technologies), an enterprise AI company that transforms talent acquisition and recruiting through semantic-matching, adaptive interviews and intelligent automation. His background in engineering and analytics fuels his vision to replace traditional keyword-based HR tools with a data-driven, AI-powered hiring stack, helping organizations hire smarter, faster and at scale.

