

A Modern Approach to Hiring, Training, Developing & Retaining Advisors

Featuring Brevity

SERIES

LAMP Rewind

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PRESENTERS



Kelvin Johnson

Chief Executive Officer, Brevity



Nile Sakr

Senior Account Executive, Brevity

SESSION OVERVIEW

Discover how AI role-play and Brevity's Meeting Analyzer help new advisors master conversations, build confidence, and grow their careers – supported by intentional strategies around influence and referrals.

Brevity currently serves more than 20 Finseca member firms, with that number continuing to grow.



"What I love about Brevity is that you get a score. You get start, stop, continue feedback. All of the scoring and methodologies can be adapted to what you consider best practice, not what Brevity considers best practice.

– Kelvin Johnson, on Brevity's adaptive feedback system

THE CORE CHALLENGE: EXPERIENCE TAKES TIME TO BUILD

The key difference between new and veteran advisors is experience. Seasoned advisors have refined their approach through real conversations, while newcomers face steep stakes – about 70% leave the industry within three years. Their greatest resource in those early years is their natural market, the very relationships most vulnerable to early missteps.

"If he could've practiced that before calling me, if he could've been more confident, he might be managing my money right now. But ultimately, he didn't."

– Nile Sakr, on the cost of unpreparedness with warm contacts



HOW BREVITY WORKS: THREE INTERCONNECTED PILLARS

1. AI Role-Play Practice

Brevity's AI role-play platform lets advisors safely practice real-world conversations using custom personas that reflect diverse client profiles. Firms can tailor support levels from guided to independent practice and access the platform in over 36 languages on desktop or mobile – even hands-free via Bluetooth.

2. Practice Visibility

Brevity's dashboard tracks individual and team practice, highlighting activity, progress, and coaching needs. Firms can sequence training by difficulty, set score-based advancement gates, and adopt flexible models like "certify when ready" to help motivated advisors ramp up faster.

*"It was the fastest and most effective onboarding I've ever had – and the quickest I'd ever hit quota. Within four months, I'd already exceeded the quota of someone who was fully ramped."
– Nile Sakr, on his own onboarding experience using Brevity*

3. Live Meeting Visibility (Meeting Analyzer)

Brevity's Meeting Analyzer integrates with Zoom, Microsoft Teams, and other platforms to assess real client conversations against practiced milestones. It provides time-stamped feedback, flags risk indicators like stalled deals or ghosting, and links practice to real-world performance through an actionable "impact plan."

RESULTS: CLIENT DATA

One of Brevity's longest-tenured clients with approximately three years of partnership data, reported the following outcomes in the first six months for new producers who used Brevity regularly compared to those who did not:

44%

Increase in sales productivity for active Brevity users vs. non-users

25%

Increase in multi- solution sales (life, disability, and financial securities in one engagement)

30%

Improvement in advisor retention

60

Days faster time-to-productivity for new advisors

Questions or want to learn more?

For additional resources or to connect with the Finseca team, contact Partnerships@Finseca.org. To get in touch with the Brevity team, reach out to Nile Sakr at Nile.Sakr@Brevity Pitch.com.