

Master your trade tools: Power user blueprint



By David Leach, CEO

Just like builders are great with hammers, we should be GREAT with our workplace tools. The difference between average and power users isn't marginal – it's transformational. **Here's how to develop your superpowers.**

The power user advantage

The difference between average and power users isn't marginal – it's transformational.

- Expert users are more productive, perform better, and have greater job satisfaction
- Every expert was once a beginner who refused to give up
- AI tools amplify these benefits exponentially

The path to power user status

Foundation skills

- Master your operating system (Windows/macOS) – learn shortcuts and gestures
- Get typing speed match-fit – foundational to everything you do digitally
- Know your devices – laptop and mobile are your primary workhorses



Software mastery approach

- Set a goal to be GREAT with your daily tools
- Experiment and try things
- Learn the shortcuts and click buttons to see what happens
- Read tool tips and help articles
- Complete online courses when available
- Ask colleagues for tricks – the person next to you might save you hours weekly

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Insurance broker's essential toolkit

The challenge: Our research found 70% of brokers spend over 3 hours daily on admin tasks. Your clients want expertise and advice, not data entry skills.



The solution: Four critical systems that work together to eliminate redundancy and create efficiency:

- 1 Policy Management System (PMS)** – your "policy operating system" where the magic happens, relationships are managed, and your business lives and breathes.
- 2 Document Management System (DMS)** – essential for compliance-heavy industry workflow and maintaining audited records of all client interactions.
- 3 Microsoft 365** – the communication and collaboration tools that keep your business moving and clients informed.
- 4 Your devices** – laptop and mobile as your windows into all other systems, amplifying everything else you do

JAVLN's integrated approach

We practice what we preach with our cloud-based toolkit:

- Google Workspace for core productivity
- Multiple AI platforms supporting technical and operational capabilities
- Slack for team communication and collaboration
- Atlassian tools (JIRA, Confluence) for project management
- No servers, no VPNs, fully mobile-enabled



Result: A more productive business, better team collaboration, and maximum customer value delivery.

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The future advantage

Brokers who master these tools will:

- Analyse risks faster
- Generate proposals quicker
- Provide clients with insights that used to take days to compile

These capabilities are available right now for those willing to learn.

Bottom line

Your trade tools are waiting. **The only question is: are you ready to master them?**

Mastering your tools - like Google Workspace, Microsoft 365, and everyday platforms - means working **simpler, faster, and smarter**. It's not about using more tech, it's about using the right tech to get the job done.

