

Case Study: Insurance Company Policy Dashboard



Created by David McKillen, Basebuild, Inc.

Client Overview

We built a (white labeled) digital platform offering secure financial tools for an insurance agency. It required deep integration with financial APIs to handle transactions, account management, and regulatory compliance.

The Challenge

Creating a seamless and secure experience that could scale while ensuring financial data compliance and encryption across different user roles and access levels.

Our Solution

To modernize this company's internal operations, we designed and maintained a custom Laravel platform that served as a centralized hub for managing service workflows and policy data. One of the core features was a robust policy dashboard that allowed administrators to view, create, and manage service policies linked to individual clients and locations. This dashboard gave staff granular control over policy rules, technician assignments, and service conditions, all in one streamlined interface.

We also integrated job scheduling, technician dispatching, and automated notifications to create a cohesive experience across departments. Our development approach ensured scalability, data security, and ongoing alignment with Trustco's operational goals. The

Case Study: Insurance Company Policy Dashboard

frontend of this Laravel app is built using Vue 2, with Vuex for state management and Vue Router for client-side navigation.

Results

The Laravel-based system brought immediate clarity and efficiency to daily operations. The policy dashboard became a vital tool, giving staff real-time insights into coverage conditions, policy details, and service eligibility. The improved system reduced errors, increased transparency, and allowed the company to serve more clients without growing overhead. With Basebuild's ongoing support, the platform continues to evolve alongside the company's needs, helping the company scale while staying in control of complex service and policy workflows.

Why it matters

This case study illustrates Basebuild's ability to handle complex financial systems and compliance challenges while delivering a scalable, intuitive SaaS experience for end users. Our secure, API-integrated architecture made this company more agile, robust, and trustworthy.