
INTRODUCTION

GE Vernova, the electrical generation equipment and services business spun off from General Electric in April 2024, faced a critical challenge: transitioning from an aging, in-house case management system to a more modern and robust solution. Ryan Dale, Global Deputy Ombuds Leader, and Michelle Ginart, Global Ombuds Leader, led the search for a platform that could better support their integrity and open reporting programs. Their journey culminated in adopting Case IQ, which transformed how they handled reporting, investigations, and analytics.

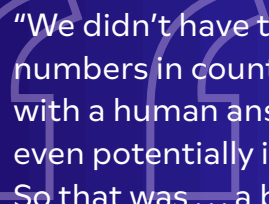
THE NEED FOR A MODERN CASE MANAGEMENT PLATFORM

According to Ryan, two primary drivers necessitated a new solution:

- 1. Structural transition:** The spin-off from General Electric meant the company could no longer rely on GE's legacy case management systems.
- 2. Functional limitations:** The previous in-house developed system, built over two decades, suffered from significant drawbacks:
 - Cumbersome development cycles
 - Limited flexibility for updates or changes
 - Reliance on external tools for data reporting and analytics

“Because it’s in-house and because there’s a development team behind it, all of the development cycle pain points come to fruition,” says Ryan of the legacy system. “If we wanted to make a change, we had to go through the whole . . . development cycle.”

Ryan also emphasized the importance of creating a streamlined and accessible reporting process to foster a culture of integrity and trust. “In the past, we only had a phone number that you could call and just leave a voicemail. You couldn’t talk to anyone,” he explains. “We didn’t have the option of the local numbers in country, dedicated phone lines with a human answering the phone call, even potentially in the same local language. So that was . . . a big selling point.”



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WHY CASE IQ?

The decision to implement Case IQ was driven by its ability to meet three critical requirements:

1. Robust Case Management

Case IQ offered a highly configurable and user-friendly platform that:

- Required no advanced IT expertise to make functional changes
- Provided a SaaS-based, cloud solution, eliminating the need for database management
- Allowed users to focus on value-added tasks rather than technical administration

2. Hotline Functionality

Previously, GE Vernova relied on voicemail-only phone numbers with limited geographic and linguistic accessibility. Case IQ introduced:

- Dedicated, local phone lines with live operators
- Multilingual support, providing comfort and accessibility to a global workforce
- A web portal for submitting concerns, now translated into multiple languages

3. Advanced Reporting and Analytics

The integration of Yellowfin, Case IQ's third-party reporting platform, was a game-changer:

- Enabled real-time analytics and automated reporting schedules
- Allowed users to configure reports and dashboards without relying on IT teams
- Supported broader compliance initiatives, including risk analysis and proactive decision-making

“We thought the platform was user friendly and modern,” Ryan says of the buying process. When evaluating potential case management tools, he says his team’s “consistent feedback on the Case IQ platform was that it looks “usable” and “nice.”

Case IQ’s advanced reporting capabilities through the Yellowfin tool also impressed the team.

IMPLEMENTATION AND EARLY IMPACT

Since adopting Case IQ, GE Vernova has seen meaningful improvements in case management. The introduction of a two-way anonymous communication portal was particularly impactful. In the past, anonymous reports left investigators unable to follow up for additional information. “In the past, we didn’t have a way, unless someone created a fake email and we emailed back and forth. There was no way to for them to track, get updates on their case, provide more information, or answer questions from our investigators while still remaining anonymous,” Ryan explains.

Their hotline has also shown early signs of success, with reports starting to flow in from employees worldwide. “When people have another avenue, you want to make sure they raise concerns, and they may be nervous in doing that, but now they can speak to someone outside of our company, right in their own native language for many of these circumstances,” Michelle shared.

Customizable notifications within Case IQ have further enhanced the user experience. In other systems, “there’s too many of them, and they become noise and they’re not helpful,” explained Ryan. “So on the Case IQ side, we’re able to tailor exactly what notifications we want, when do we want them, and then even allow users to subscribe or unsubscribe from certain notifications as they see fit.”

LOOKING AHEAD

GE Vernova has ambitious plans for the future with Case IQ. The team intends to leverage automation to streamline compliance workflows and integrate regulatory requirements, such as the EU Whistleblower Directive, into the system. Ryan says, “We’re just letting the tool kind of guide the day-to-day work, you know, operationalize it in the workflow.”

Advanced analytics will also play a critical role in their strategy. With Yellowfin, the team plans to move beyond static reports to more sophisticated risk analysis and predictive modeling. In fact, Case IQ is helping expand reporting beyond the immediate team. “We have a broader, compliance-wide initiative to do more with data,” Ryan explains. “So this is about more than ombuds and open reporting. It’s about more than the program that we’re managing here. There’s a broader use case for bringing in the next generation of data analytics, and this is going to be kind of leading the charge in that broader initiative in this space, using Yellowfin embedded within Case IQ.”

CONCLUSION

The implementation of Case IQ has transformed GE Vernova's approach to case management, creating a foundation for a stronger culture of integrity, transparency, and compliance. With modern tools that empower employees to report issues and investigators to work more effectively, the organization is better prepared to address challenges and navigate an evolving regulatory landscape. As Michelle summarized, "When we talk to our chief compliance officers within our businesses, or our business ombuds leaders, this was a huge win for us."

ABOUT CASE IQ

Case IQ offers an end-to-end compliance and case management solution that consolidates compliance monitoring, whistleblower solutions, third-party risk oversight, investigative case management and compliance approval and disclosures workflows. Lextegrity was acquired by Case IQ in 2025 and is now offered as an end-to-end suite of compliance tools.

Case IQ

Learn how Case IQ can help you achieve end-to-end compliance with confidence.

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