



CASE STUDY

# Halliburton Automates Compliance Pre-Approval Processes

**HALLIBURTON**

Case IQ



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## THE NEED

Halliburton is one of the world's largest providers of products and services to the energy industry, with more than 40,000 employees, representing 140 nationalities in over 80 countries. Halliburton sought an automated pre-approval workflow tool to solve the challenges and address the pain points associated with manual, paper-based pre-approval processes, including:

- Transitioning away from non user-friendly systems, inaccessible across devices, and cumbersome to access remotely
- Manual effort to report on data, including room for improvement in identifying the status of requests and approvals in workflows
- Efficiency gain opportunities for Compliance and the business in submitting, reviewing, and tracking requests and approvals

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## THE SOLUTION

Halliburton partnered with Case IQ\* to implement and globally launch its Approvals & Disclosures software to centralize and manage the pre-approval of certain business activities, including:

- Social Commitments
- Business Hospitality
- Conflicts of Interest

\*Lextegrity was acquired by Case IQ in 2025 and is now offered as an end-to-end suite of compliance tools.

### INDUSTRY

Oil & Gas

### USE CASES

- Pre-Approval Workflows & Automation

### BUSINESS ISSUE

Halliburton struggled with the challenges associated with a manual, paper-based pre-approval process and sought an automated workflow pre-approval tool to address the pain points associated with this issue.



“Lextegrity's team of expert former in-house counsel and auditors understand what we're doing and bring the substantive knowledge necessary to deploy an effective and efficient tool that works for Compliance and the business.”

**Mauricio Almar**  
Sr. Director and Managing Counsel,  
Global Compliance & Investigations



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## THE RESULTS

Halliburton's implementation of Case IQ's Approvals & Disclosures software has provided Compliance and the business the automation and reporting capabilities necessary to manage certain of its higher-risk activities in a more efficient and effective manner.

The flexibility to customize and add bespoke pre-approval workflows applicable to its business processes - and to centralize these workflows in a single platform - has enabled the company to address its unique risks more efficiently and effectively.

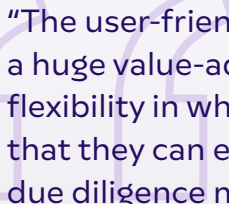
The application's user-friendly and intuitive interface, as well as its accessibility across devices (including mobile phones and tablets), has been well received by the organization.

The automation built into the application, including intelligent question and approval logic, has saved the company time and resources, enabling compliance pre-approvals to be handled more quickly and efficiently.

The ability for users, including Compliance, to see the status of requests in a pre-approval workflow at any given time, means less time is spent chasing approvals.

Integrated screening functionality - which runs automated sanctions, watchlist, and adverse media checks on recipients of spend and allows users to adjudicate potential matches directly in the application - has significantly improved the ease and efficiency of the company's screening and tracking methodologies.

Robust reporting provides information on the compliance program in real-time, replacing manual efforts previously required to generate reports and program metrics.



“The user-friendliness and mobile accessibility of the application have been a huge value-add and was exactly what we needed. Submitters have more flexibility in what device they use to submit requests. Managers appreciate that they can easily review and approve requests from their phones, and due diligence materials are centralized in a single platform. That’s the kind of flexibility and streamlined improvements that Lextegrity’s tool brings us at the business-level.”

**Mauricio Almar**  
Sr. Director and Managing Counsel,  
Global Compliance & Investigations

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## ABOUT HALLIBURTON

Founded in 1919, Halliburton is one of the world’s largest providers of products and services to the energy industry. With more than 40,000 employees, representing 140 nationalities in more than 80 countries, the company helps its customers maximize value throughout the lifecycle of the reservoir – from locating hydrocarbons and managing geological data, to drilling and formation evaluation, well construction and completion, and optimizing production throughout the life of the asset.

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## 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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