



CASE STUDY

Streamlining Yearly Conflict of Interest Disclosure Campaign at Halliburton

HALLIBURTON

Case IQ



THE NEED

With more than 40,000 employees across 80 countries, Halliburton needed a more efficient and user-friendly system for managing yearly conflict of interest (COI) disclosures alongside ad hoc COI requests submitted throughout the year. Key enhancements from the current process included the ability to effortlessly link and organize a user's ad hoc disclosures and annual disclosures in one place, a more effective way to track the progress of assigned users and completion rates, and a refined process to create a more enjoyable user experience from start to finish.

INDUSTRY

Oil & Gas

USE CASES

- Conflicts of Interest
- Compliance Automation

BUSINESS ISSUE

Halliburton sought a more efficient and user-friendly system for managing yearly conflict of interest (COI) disclosures alongside ad hoc COI requests submitted throughout the year, including the ability to i) effortlessly link and organize a user's ad hoc disclosures and annual disclosures in one place, ii) more effectively track the progress of assigned users and completion rates, and iii) create a more enjoyable user experience from start to finish.

THE SOLUTION

With the launch of the yearly COI campaign from Case IQ's* platform, Halliburton's users saw material improvements to nearly every aspect of the process.

In order to meet the requirements of a more user-friendly interface, Case IQ's team leveraged its familiarity with existing COI processes and reshaped the design to include an intuitive navigation, an inviting modern design, and a more efficient workflow. In the era of smartphones and tablets, users were given the added ability to conveniently submit, review, or approve disclosures across devices from any location. The resulting easy-to-follow and accessible layout required little to no user training, saving significant time and resources.

In previous COI campaigns, ad hoc disclosures were required to be resubmitted on a yearly basis alongside the annual campaign. By automatically linking an individual's previous ad hoc disclosures within the yearly campaign, users saw a decrease in the amount of time it took to complete their assigned disclosures. It also combined ad hoc and annual disclosures into one centralized database for storage and documentation retention purposes. Approvers within Halliburton's organization were able to easily review an employee's historical COIs within one request, reducing potential risk to the company made by mistakes or oversight. Time saved by connecting ad hoc and yearly disclosures is expected to not only continue, but to aggregate year-over-year benefits.

The Case IQ team answered yet another challenge head-on by implementing Reporting Insights - Campaigns – the comprehensive solution for more robust reporting and analytics. Stakeholders within Halliburton were able to more efficiently and easily access real-time data around assigned users, current status, completion rates, process metrics, and much more. Filtering capabilities within the dataset allows for further analytics such as users by country, business area, division, function and/or sub function. By utilizing this data, it was easier to understand to whom the campaign was assigned and also follow up with users who had not completed their disclosure and approvers who had not completed their review.

The Case IQ platform also enabled Halliburton to manage all COI mitigation items through its task management functionality. This feature allowed approvers to document all mitigation and assign mitigation tasks to submitters for confirmation or completion.

Reporting Insights - Tasks also provided added benefit to Compliance with in-depth analytics of all mitigation items.

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



THE RESULTS

A friendlier and more intuitive interface along with additional access across devices led to a more enjoyable user experience. With the new deployment, Halliburton saw rapid user acceptance, speedy completion, and an overall more efficient annual campaign.

The upgraded layout, powerful reporting capabilities, and time-saving measures between ad hoc and yearly disclosures resulted in the shortest launch to 100% campaign completion in Halliburton's recent history.

"We continued to see 100% completion rates, but this time we achieved that target much faster. User acceptance was better than expected, administrative time and resources deployed to complete the campaign significantly decreased, and we now have a single source of truth for our ad hoc and annual campaign processes in one consolidated location."

Mauricio Almar

Sr. Director and Managing Counsel,
Global Compliance & Investigations

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.

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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