



CASE IQ CASE STUDY

How One Equal Opportunity Investigator Got Ahead (and Stayed Ahead) with Case IQ

Case IQ



THE CHALLENGE

Kathleen, an Equal Opportunity Coordinator and Investigator for a municipal government in Florida, manages a critical and high-stakes function: investigating all discrimination and harassment complaints from both municipal employees and the public. With a caseload covering approximately 4,000 employees and numerous public interactions, Kathleen faced a challenge common to many public sector offices—manual, paper-based processes.

“Pre-Case IQ, we used paper files,” said Kathleen. “Everything was done, you know, with paper . . . Our organization wanted to move toward paperless.”

Beyond going paperless, her office needed a secure, efficient way to manage sensitive investigations under strict public records laws and confidentiality requirements. The system had to support discrimination and ADA accommodation investigations, not generic HR processes.

Kathleen and her colleagues also wanted the ability to track the types of complaints received and which departments they originated in to help them identify possible complaint trends. They wanted to be able to run reports based on this information to share with the organization's leadership, allowing the organization to identify where additional staff training and similar resources were needed.

THE SOLUTION

After exploring several tools and finding most solutions either geared toward law enforcement or human resources, Kathleen discovered Case IQ. “Really only found Case IQ for investigation management and what I was looking for was something that would manage a pure investigation from that point of view.”

Kathleen implemented Case IQ for her organization in 2017 and has since leveraged additional features and customizations.

They prioritized:

- **Confidentiality and Security:** “It had to be confidential . . . especially important with ADA accommodation cases where medical information has to be kept confidential.”
- **Ease of Use and Case Tracking:** “It had to have functionality that would . . . be able to have reminders . . . and an easy-to-follow format where we could keep the cases tracked.”
- **Customization:** “We also wanted something that wasn't completely out of a box that we could customize to a certain extent, and we've loved this about Case IQ. We've worked with Case IQ to build something . . . for our organization.”

Case IQ also provides the reporting functionality that Kathleen's organization was looking for. This allows the organization to use case data to identify trends and address any systemic issues leading to complaints.

THE RESULTS

Kathleen's office has seen remarkable improvements in caseload management and timeliness.

“For the first time . . . I have a current caseload. It's fabulous,” she said. “Things don't fall through the cracks, and that's essential in what we do.”

Case IQ's built-in reminders and workflow tools help ensure investigations are completed on time, benefiting both the organization and those involved in the cases.

Additional benefits include:

- Seamless integration with internal HR systems
- Quick onboarding for backup personnel during absences: “We set this up so that any of my colleagues . . . can get into this app and work.”
- Readiness for succession: “I will be leaving the organization in a few years . . . This helps ensure anyone can pick it up and go.”

LOOKING AHEAD

Kathleen is particularly excited about Case IQ's evolving AI capabilities, especially for investigative report generation.

"With the AI now . . . the app can pull together the shell of a report and actually review documents, review our policies . . . That helps out." This AI integration supports efficiency without replacing professional judgment. "My skills . . . can be used as far as analytics . . . [while it] takes care of the housekeeping."

WHY CASE IQ?

When asked for final thoughts, Kathleen didn't hesitate to recommend Case IQ. "If you're doing workplace investigations—whether it's Equal Opportunity, Title IX, fraud . . . I think it's really the only app that exists. We're just excited that it's as wonderful as it is and keeps improving."

She also praised the Case IQ team: "You're not just some cog in a wheel . . . You get really great customer service, and that goes a long way."

CONCLUSION

Kathleen's experience illustrates how the right technology can fundamentally enhance investigative work in the public sector. With Case IQ, her office transitioned from a burdensome paper-based system to a streamlined, secure, and highly customizable digital platform, empowering her to stay up to date on cases, improve compliance, and ensure accountability. As Kathleen prepares to pass the baton in the coming years, she's confident that Case IQ will continue to serve as a reliable, future-ready tool for her organization. "We have an awesome system and we're looking forward to keeping it around for a long time," she said; and with Case IQ's powerful features, responsive support team, and ongoing innovation, it's clear why.

Take the first step toward revolutionizing your case management system with Case IQ.

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