Trially

Reengineering Clinical Trial Recruitment

How a leading site doubled enrollment for a complex study in record time

Overview

Clinical trial recruitment remains one of the most significant challenges in advancing medical research. According to the Tufts Center for the Study of Drug Development, 11% of trial sites fail to enroll a single patient, 37% fall short of their enrollment goals, and a staggering 80% of trials do not meet their recruitment targets.

The current enrollment challenges boil down to three key areas:

- Social ads often feel like a shot in the dark
- EHR searches are time-consuming and yield limited results
- Site feasibility feels like a game of guess-and-check

We as an industry need innovative solutions that address these inefficiencies and deliver life-saving therapies to patients who need them most.

Trially is a fully compliant AI matching software that helps you enroll higher quality patients from your EHR with unprecendented speed and precision.

Executive Summary

A prominent Site Network serving 4 million patients nationwide was struggling to recruit enough patients for a complex weight loss study so they engaged Trially to help.

Within a few weeks, Trially's fully compliant AI matching software was integrated into their EHR system, NextGen. The site coordinator uploaded six highly complex protocols into Trially and Voilá!

Trially rapidly transformed each protocol into discrete inclusion and exclusion criteria cards that could easily be toggled on or off depending on their unique study needs. Once the criteria was set, hundreds of highly eligible patients were identified and prioritized within their EHR system.

The results were eye-opening. The site network was instantly equipped with the knowledge and tools to centralize their recruitment strategy on these high-quality candidates that mattered most.

Six months later, the site team slashed over 90% of its clinical chart review time, reduced screen failure rates by 73% and doubled its monthly enrollment, enrolling more qualified patients into the trial faster than ever before.

> Trially ROI is a no brainer! They plugged into our sites EHR and instantly identified hundreds of high quality patient matches. It saved us a ton of time on chart reviews, reduced screen failures and became our #1 recruitment source at the site.
>
> **VP Development**

The Challenge

A Large site network was facing significant hurdles in their cardiology site. They were under immense pressure to maximize patient enrollment for a complex weight loss study for Acute Coronary Syndrome (ACS) but struggled to meet deadlines and curb operating costs. They relied on traditional methods like social media ads, physician referrals and EHR search, but it wasn't enough; site staff were overburdened, spending 36 hours each month on manual chart reviews for a single protocol. Despite these exhaustive efforts, they still encountered difficulties in recruiting enough patients. Delays were imminent and the pressure was palpable, as they strived to up-level their recruitment and win high value studies in a competitive research market.

The magnitude of their challenge called for a more innovative approach. Their journey underscores the critical need for tools that can automate time consuming and ineffective EHR searches while complementing existing site workflows. Site staff were already burdened with multiple system logins, meaning they needed a solution that was fully compliant, simple to use and easy to integrate into their existing tech stack.

In an earnest attempt to address these challenges, the team engaged Trially to alleviate site burden, and focus their recruitment strategy on the most promising patients for clinical research.

The Solution

On Day 1, Trially's advanced infrastructure security and compliance (e.g. HIPAA, SOC 2, FDA Part 11) enabled the site network to confidently embed Trially within their ecosystem. Different from other vendors, Trially's software provides a client data isolation model that ensures strict data siloing per tenant and isolated cloud storage buckets with unique encryption keys.

Within one month, Trially had integrated with NextGen, the existing EHR system, and was ready to be deployed. Site staff were quickly onboarded, thanks to a "stupid simple" technology and nimble team who were ready to jump in with two feet.

To ensure success and continuous improvement, we provided hands-on support:

- Conducted weekly feedback meetings with site staff to gather insights and refinethe platform
- Developed an in-platform "Feedback" feature, allowing staff to share input seamlessly

Trially helped the struggling site unearth recruitment process challenges that had a ripple effect across their entire network. For example, they instituted organizational standards for how many times to call a patient, vs. leaving it to individual CRCs and recruiters to decide

> I love how easy it is to use. Our site coordinator really took the reins and now we're turbocharging our site!
>
> Regional Site Director

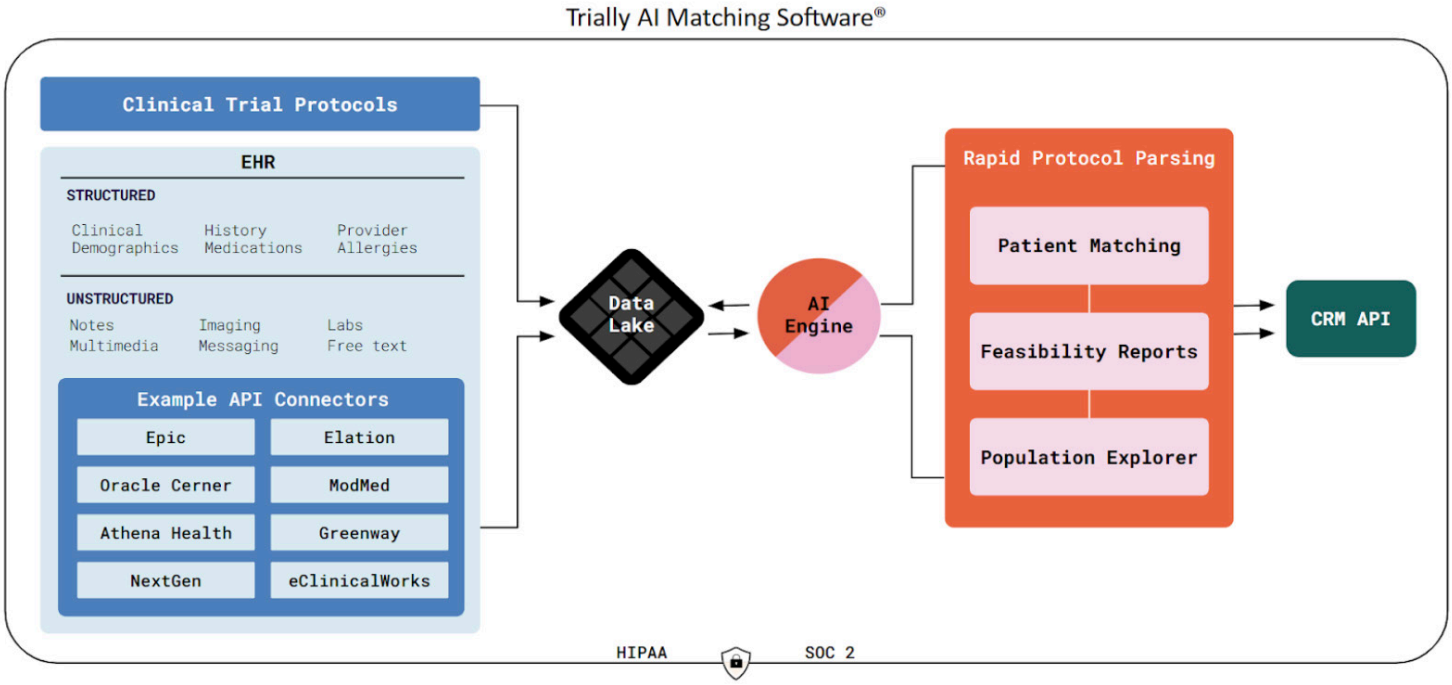
Key Highlights

Rapid Protocol Parsing
Protocol details were parsed in just five minutes, drastically reducing the time required to review patient charts and initiate trial enrollment. Additionally, site users could create cohorts with refined I/E criteria to further increase enrollment potential

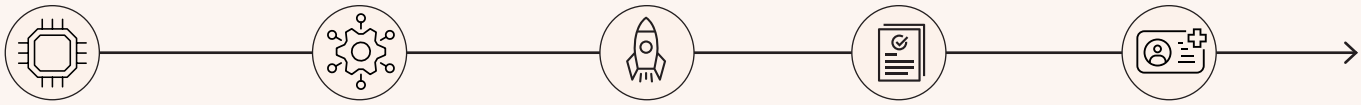
High-Precision Matching
The platform identified and prioritized hundreds of highly eligible patients across six protocols with unprecedented speed and accuracy, complete with clear audit trails for site investigators, healthcare teams and trial sponsors.

Strategic Recruitment
The site network refined their recruitment process by focusing on high-quality patients. Personalized outreach—via phone or during an upcoming clinic visit—ensured these candidates were prioritized for upcoming trials within the recruitment period

This centralized approach not only optimized the use of CRC time but also ensured that staff focused their efforts on the candidates who needed their attention most. Trially became the #1 recruitment source at their cardiology site, and is continuing to be rolled out across the network.



Implementation process



IT Setup and approval
1-2 Weeks

System integrations
1-day for EHR API
2-4 wks for new EHR
2wks for CTMS (CRIO

Launch
1-Day onboarding
Live 1:1 sessions
"Feedback" feature

Protocol parsing
5-10 min parsing
with I/E criteria cards

Patient ID & Match
Matches generated
in real-time

The Results

Site Outcomes

>90%
reduction in manual chart review hours for CRCs from 36 hrs to 2.5 hrs per month.

73%
reduction in screen failure rates from 52% to 14% due to higher quality patients.

2x
more patients enrolled per month for complex trial.

Weight Loss Study Outcomes

500
trial-ready candidates pre-screened and prioritized for weight loss trial.

5
scheduled screening visits for high quality patient before the Site Initiation Visit (SIV).

1/2
of enrollees are from Trially; the other half are from non-EHR sources.

The implementation of Trially has dramatically reduced the workload for site coordinators. Manual chart review hours have decreased over 90% from 36 hours to just 2.5 hours per month.

This efficiency boost was paired with a substantial improvement in enrollment quality, as screen failure rates dropped significantly from 52% to 14%. The site also achieved a twofold increase in patient enrollments per month.

For the weight loss study, the team pre-screened 500 trial-ready candidates, scheduled 5 top quality patient screening visits before the Site Initiation Visit (SIV), and successfully enrolled 50% of patients into the trial—all within just six months.

Looking ahead, the site team is poised to deploy Trially's innovative AI matching software across its site network, redefining its recruitment strategy to accelerate enrollment, minimize screen failures, and unlock new study procurement opportunities that were previously unattainable.

Discover how Trially can transform your recruitment efforts — **schedule a demo today.**