

How Trially helped a physician group get 8 randomizations for one study in the first month.

A leading physician group needed to meet high enrollment demand for their upcoming trials. With Trially Connect, Margo's AI voice and text outreach pre-screened candidates and booked 27 qualified candidates directly into the site's calendar, resulting in 8 randomizations in the first month, prompting the team to expand from one study to six.



MARGO

Hi Eleanor, this is Margo. I'm calling about a research study you raised your hand for. Do you have two minutes to see if you qualify?

ELEANOR

Sure, go ahead.



Preferred Primary Care Physicians (PPCP) partnered with Trially to bring in net-new patients from Meta ad leads (optimized with Trially) plus previously-interested candidates from prior campaigns and clinical data systems. Margo pre-screened every candidate by phone and text, with intelligent nudges and follow ups with the goal of booking qualified candidates into the calendar. Here are the results:

8

randomizations in
month one

2

randomizations in
week one

10×

modeled ROI, on
purchase price &
randomization

40

hours back for
revenue-
generating
activities

The Challenge

PPCP was running clinical research across four sites with 110,000+ patients and 50+ active trials, and enrollment demand outpaced coordinator capacity. CRCs burned hours screening ineligible patients while qualified ones slipped through the cracks.

The Director of Clinical Research refused to run a “one-pony show.” He said that recycling the same EMR database year after year meant looking at the same patients for the same disease states. As he put it, “it’s a big world of people, and it’s a numbers game.” The group needed a steady inflow of net-new patients without adding headcount or manual screening work.

“I was extremely skeptical of this... But it actually worked. And the patients that we were getting were legitimate patients... a couple randomized in the first week based off of, frankly, just using this product.”

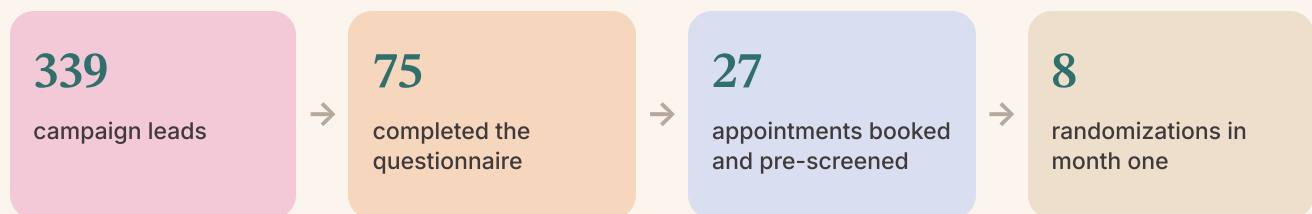
ALAN ABRAHAM · DIRECTOR OF CLINICAL RESEARCH

The Solution

Trially Connect put Margo, an AI voice-and-text agent, in front of a net-new patient funnel plus previously-interested candidates and matched EMR patients. Margo called and texted every candidate, pre-screened each one against 5–7 key criteria on a study-specific landing page (including BMI and cardiovascular history for the pilot trial), and booked only qualified candidates directly onto the site calendar. Margo let each patient choose their nearer location and appointment time. Coordinators did no outreach and no first-line screening and were notified only when a qualified appointment was booked.

According to the Director of Clinical Research, **"the biggest hurdle is many sites have just been doing things the way they've been doing things forever... and the first three months were a bit of a struggle because everyone's used to doing things a certain way."**

TRIALLY CONNECT PATIENT ENGAGEMENT FUNNEL



Trially Connect pilot funnel (8.0% of campaign leads reached a booked appointment). Margo handled outreach, screening, and booking end to end, so coordinators started every visit with the key eligibility answers already collected.

The Result

Margo booked 27 qualified appointments, leading to 2 randomizations in week one and 8 in the first month. All patients pre-screened by Trially AI had a warm handoff to site staff, without coordinators doing any of the outreach or first-line screening, which freed ~40 hours back to revenue-generating activities. PPCP received a **10x return** modeled against the purchase price and the patients randomized.

The proof was in the work hours reduced. As the Director of Clinical Research put it, **"we're not doing a whole bunch of work to figure that out... it saves a lot of time on the coordinator's end."** PPCP quickly expanded from one study to six and began referring Trially to help increase randomizations for other research sites.