Are You Expecting Site Engagement Without Being Engaging?

Communication best practices to build site relationships that last.

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What if sponsors and study teams could build connections with sites the way other industries build connections with customers? What if site engagement transcends any specific study as enduring, thoughtfully nurtured, mutually beneficial relationships?

This playbook provides practical steps for implementing universal marketing best practices across clinical trial communications and shares how Teckro is purpose built to enable seamless execution. Designed for study teams ready to revolutionize their approach to site engagement, this playbook caters to those who want to keep pace and build enduring relationships with a workforce that is increasingly burdened and more in need of support than ever. Study teams looking to transform their site engagement will learn:

- Common stumbling blocks hindering engagement on your study and why a focus on meaningful site relationships is the key to overcoming them
- Actionable steps to implement a best practice strategy for site communications on your study
- Why Teckro is the solution you need to make immediate, impactful change

We all recognize the benefit of effective communication and expect it across most areas of life. The modern world pursues increasingly dynamic tools to foster connection more readily and authentically. There are more clinical trials than ever before, yet the industry is notoriously out of step with the exponential advancements of modern technology. Among the many notable impacts, study teams are struggling to meaningfully connect and communicate with the investigators and research staff on the frontlines of their clinical trials. The best practice strategies covered in this playbook include:

- **Know your audience** and send them targeted messages at the right time
- **Refine your message** and harness tools that prompt desired site actions
- **Establish your voice** and prioritize consistency to build trust and familiarity
- **Select optimal formats** to deliver your message in the most impactful way
- **Measure outcomes** and apply insights to drive continual improvement

Once the best practices are explored, the playbook covers real world results. We highlight in particular one study team that achieved best-in-class site engagement with a targeted recruitment campaign. Site engagement success metrics for this case study include site adoption of Teckro, site activity and interactions in Teckro (and therefore in the study), and how many site staff are opening study team messages.

Targeted, timely communication should be central to your site engagement efforts. The most impactful site outreach is tailored, consistent and intentionally aligned with study milestones. Teckro's uniquely interconnected content and communication tools equip you to nurture enduring site relationships that lead to greater participation and retention, fostering accelerated, collective progress towards shared goals and ultimately, enhancing study outcomes.

The best time to implement communication best practices is now.

Whatever stage your study is currently in, it's never too late to start prioritizing targeted, timely site outreach. Teckro provides the tools you need to transform your approach to site engagement - integrated for a level of deployment efficiency you can't achieve anywhere else.

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The Playbook on Good Communication

At its core, marketing is the art and science of building relationships with intention. Once established, those relationships open the door to growth opportunities, and the connection of products and services with people who want and need them. It's communication within a thoughtful, strategic framework (your campaign) that provides information, raises awareness, builds lasting rapport and drives success. Good relationships offer a positive customer experience and are built via strategies that are effective, measurable, repeatable, and scalable.

A good approach to marketing answers the following questions:

- **Target audience:** Who are you trying to reach?
- **Messaging:** What are you trying to say?
- **Voice:** Who are you and what can be expected of you?
- **Medium:** What's the best way to share your message?
- **Campaign measurement:** Is your approach working, can it be improved?

The Key to a Better Site Experience

So, how does this relate to study teams on clinical trials?

Marketing is consistent, relevant, compelling communication. This is where study teams can learn to evolve their approach to site engagement. If study teams approached communication with the mindset that their site staff are "customers" - how would that impact the way interactions are managed?

What if sponsors and study teams could build connections with sites the way other industries build connections with customers - so that site engagement is not superficial for a specific study, but an enduring, thoughtfully nurtured, mutually beneficial relationship?

In this playbook, we will look at the ways study teams can apply communication best practices to build site engagement with longevity and a meaningful site experience, instead of approaching site communication as a per study transaction.

Applying the Playbook to Site Engagement

When you understand marketing communication as an endeavor to build relationships, it can be easily reframed for versatile application.

Embracing this concept will unlock the potential of the playbook to transform your site relationships.

Read on to learn the fundamental steps that study teams should take to apply communication best practices to their clinical trial outreach - enhancing their interactions with site staff to create a more informed, supportive, and engaging experience.

What's Your Objective?

Before beginning, study teams using this playbook should determine an objective for each communication. What is the goal of your message? What action do you hope to prompt? What metrics will best define success? You can then intentionally structure your campaign around this objective, with an informed approach to each of the principles outlined here - specifically tailored to your study.

A communication campaign comprises all the actions taken to communicate something to the sites on your study, from confirming the "why?" of the communication, through determining the audience, the message content and tone, and how it should be delivered - until you are ready to analyze outcomes.

Target Audience

Who are you trying to reach?

Establish and understand study audiences for tailored, impactful outreach.

Within a clinical trial, there are certain things that are important and obligatory to communicate, and this communication must be documented and recorded. However, there is vast scope for greater personalization across clinical trials - something that is seen very rarely.

It's invaluable to identify the correct audience for the breadth of communications that occur. If you're looking to be truly useful and foster engagement, one size never fits all. Study stakeholders should be segmented into audiences so that study teams have granular control over what communications each audience receives. Sites are frequently overwhelmed with countless emails, sometimes sent recurrently without discretion - frustrating site staff and sapping more of their limited time and attention.

Targeted content is specifically valuable to those it is tailored for, so the key is to have a deep understanding of each study audience. This ensures the right message reaches the right people at the right time. If an audience receives a message that is useful and relevant to them, as are the next five or ten - this builds trust, and they are far more likely to engage with what you're sending. You'll convert them into loyal consumers.

Messaging

What are you trying to say?

Send useful, relevant messages that guide site staff to helpful resources.

Calls-to-action (CTAs) are specific prompts that encourage your audience to take a specific action. This is usually achieved via links or buttons added into a message that when tapped, take the reader directly to something else - such as a document you want them to read, video you want them to watch, or form you want them to complete. With CTAs, what's important is remembering that it's not just a button - it's a *call to action*, which should be rooted in what you are trying to achieve with your message overall. The button is simply a handy tool to prompt that action in a way that is easy and familiar. Study teams can use CTAs in their site messages to encourage specific activity, such as reviewing an updated section of the protocol following release of an amendment.

Much like modern websites and apps are designed to keep visitors there as long as possible, cross-linking study communications with study content and regularly directing site staff to view that content will support engagement and help prevent attrition of study awareness. CTAs are used frequently in marketing to foster relationships and direct people to other helpful information. Making it easy for site staff to get to specific, useful resources directly from a message is an innovative move for study teams to make.

Site messages should be tailored and succinctly communicate important, useful information or news. This could be anything from timely guidance for an upcoming visit or an update about a protocol amendment, to recognition of recent successes or a request for site feedback. Study teams should be deeply familiar with the needs and interests of their sites, and tailor their communications accordingly.

Voice

Who are you and what can be expected of you?

Establish your voice and define your standards.

Ahead of starting to communicate with study sites, sponsors and study teams should take the time to determine their voice. One that will foster the site experience they want to deliver and will, when delivered reliably, water the seeds of the site relationship they wish to nurture. Along with operational planning, an established voice that is understood by anyone who may "represent" the sponsor and study team, will guide the standards that will need to be consistently met across all site communications.

Whether this is a conversational tone that helps promote a culture of openness and clarity, accessible language that encourages a supportive and collective mindset, or study highlight messages every Friday that demonstrate a commitment to celebrating successes - defining a clear voice and a set of communication standards across your study team will mean it is little effort to reliably work in alignment with them. This secures the perception of your study team, which will build that all-important trust and loyalty with sites.

Utilize tools that help you remain consistent - use templates for repeatable site communications to ensure governance of messaging to all recipients and build in process automations to ensure you can reach out to all sites in the same way, no matter their location or time zone.

Reliably connecting and communicating with your sites in a consistent way helps them develop healthy expectations, and supports an ongoing, reliable site experience. Contrary to the transactional approach, building relationships with your site staff lays the foundation for trust. This in turn can open the door for better understanding and a two-way communication super-highway - ultimately boosting engagement, collaboration and overall study outcomes.

Medium

What's the best way to share your message?

Prioritize the best formats for your message and audience.

Study teams should explore creation of a communication strategy - an entirely new approach to delivering information to site staff and one far beyond the poor experience of static documents piled in a clinical trial portal. Timely, relevant communication with associated resources sent to tailored audiences in a wider variety of fit-for-purpose mediums will allow site outreach to be both helpful and impactful.

Meeting sites where they are to take account of their preferences, environment, experience, and time constraints - as well as their current place in the study lifecycle - boosts the success of your outreach. For example, a carefully thought-out communication strategy will mean you can better support site staff that are research naïve and enable proactive accommodation of accessibility needs or language barriers. The good news is that in a clinical trial environment - you already have your validated contact list, and you should have a good understanding of what your site audience need from you. Using familiar, digital formats like video allows sites to receive study information in a way they're used to across other areas of everyday life. Visual formats are useful for delivering guidance on complex study procedures, as they are easy to consume and proven to support increased understanding and retention of information.

For example, study teams could send a message to each site prior to their site initiation visit (SIV) to welcome them to the study and help them prepare. Direct communications can be highly personalized and segmented and they're also easy to measure (more on that next!) Each message can be specifically targeted per site based on the date of the SIV and could include a localized summary of the agenda. You could complement your message with an embedded CTA (call to action) linking to a welcome video, greeting the new site and sharing the study design and the intentions and aspirations of the study. You can remind the site of the importance of familiarity with the protocol inclusion/exclusion criteria or study population - with a secondary CTA prompting site staff to view the protocol in Teckro. As the study progresses, further strategic communications can be considered, such as targeted site messages based on the status of patients. Utilizing native smart device tools such as push notifications and notification reminders help prompt busy site staff to view beneficial study content in good time.

Targeting communications in this way drives overall retention of sites, but more importantly - sites who are engaged with the study and opening study team messages.

Campaign Measurement

Is your approach working, can it be improved?

Use key performance metrics to track study engagement.

Study teams should monitor and evaluate the performance of their study content and communications to enhance understanding of what makes for effective site outreach on their study. Study teams can learn about their audience, identify areas for improvement and make data-driven adjustments to their site communications to enhance future success. If you have taken the effort to create and action a communication strategy, don't waste the opportunity to draw available insights from it.

You may choose to look at how many people are opening your messages to identify sites or individuals not reading them, then you can follow up to see what the barriers are. This is just one example of an opportune moment to survey your sites for direct frontline feedback. Site staff hold a wealth of insights - you just need to ask and make it easy for them to answer.

You should also track what content is being viewed or searched for, and more importantly - if there are sites not looking at your study resources at all. Low engagement with study content and communications could be borne of a lack of time or opportunity. Or perhaps misunderstanding around the intention of shared information and the importance of staying up to date with messages. But once identified - these are obstacles that can be addressed with broad clarifications or operational adjustments.

On the other hand, perhaps sites are disinclined to engage with your messages and resources because they have found past communications unhelpful, overwhelming, generic or confusing (*cough* traditional site newsletters *cough*) - this insight is invaluable, if confronting, for future operational efficiency. It indicates you might not have fulfilled some of the aspects we've already talked about - are you tailoring your messages to a defined audience? Are you using the best mediums? Have you delivered consistent value in a recognizable voice, to establish trust? It may take some trial and error, which is why measurement and analysis is so important for the evolution of your study communications, resulting site engagement and ultimately study success.

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A Modern Tool to Facilitate Communication

So, we understand why and how we should invest in building better, more meaningful relationships with site staff but in practical terms, what is available to help study teams put this into action?

Teckro is an intuitive app for digitally interconnected clinical trials - releasing the full potential of your study protocol and transforming it into a key that unlocks speed, efficiency and oversight. Teckro gives sponsors and study teams a comprehensive toolkit for communicating effectively with your sites, building trust and loyalty that lasts beyond an individual study. The app allows study teams to take these tried and tested marketing principles and apply them to their study outreach. Prioritizing this experience for sites and building site relationships will boost engagement for the longer term, ultimately supporting better study outcomes.

Our digital content and communication features work collaboratively, meaning sites, monitors and study teams are only ever a tap away from each other and the study information they need.

The best time to implement communication best practices is now. Whatever stage your study is currently in, it's never too late to start prioritizing targeted, timely site outreach. Teckro provides the tools you need to transform your approach to site engagement - integrated for a level of deployment efficiency you can't achieve anywhere else.

Teckro's user-centric design makes accessing your study simple and pleasant for everyone. Site staff active in Teckro are active in your study.

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Launch Your Site Relationship Strategy

Know Your Audience

- Learn about your sites and focus on what they need across the study lifecycle. Send impactful, tailored messages to the right people at the right time using Teckro's integrated contact lists and easy recipient filtering tools.

- Mitigate common obstacles per role or study phase and support site staff to make informed decisions by targeting outreach in alignment with key study milestones - reducing risk and increasing site engagement.

Refine Your Message

- Share timely study reminders and updates quickly and easily with Teckro - sites receive all messages in one place. Guide site staff towards supporting resources and points of contact by linking to them directly from your message.

- Provide the current protocol and other study resources in one app, for fast point-of-care reference. Empower sites with instant study access and expert answers, anytime anywhere.

Establish Your Voice

- Leverage Teckro message templates to establish your voice and enhance consistency. Scope repeatable communication campaigns that reliably deliver your message in a recognizable way, building site trust.

- Define an intentional, value-led approach to site outreach to build authentic site relations. Augment with reliable, centralized content and communication in Teckro, promoting collaboration across study stakeholders.

Select Optimal Formats

- Enhance understanding and better engage sites by developing a content strategy for site communications and selecting the optimal content medium - accessible for sites in one simple app.

- Harness the power of multimedia by uploading video and podcast content in Teckro, supporting greater comprehension of the study and its objectives. Native device push notifications help prompt timely action.

Measure and Apply

- Analyze and proactively address issues surfaced on Teckro's integrated study activity dashboards - unique study oversight you can't get anywhere else. Identify risks earlier and use learnings for agile course-corrections.

- Utilize surveys to easily gather direct frontline feedback from site staff. Delivered in one place alongside study messages, Teckro surveys are fast and intuitive to complete in-app, increasing response rates.

Achieving Best-in-Class Site Engagement

One study team showcases the power of targeted communications on Teckro

Results matter. Determining the best communication approach amid pervasive challenges in an ever-evolving clinical trial landscape can be difficult. Sponsors must cut through the noise and keep their study top of mind. Let's look at one study team achieving tangible, positive outcomes using the best practices outlined in this playbook.

Tailored, Milestone-Aligned Site Outreach

This global, top 20, Phase III respiratory study devised a targeted recruitment communication campaign using Teckro. The study team's goal was to see strong screening and enrollment activity. They began engaging their sites through Teckro, directly after SIV. To keep sites focused on recruitment objectives and provide support when it was most needed, the study team shares useful recruitment tips and region-specific enrollment updates.

Sending regular, targeted communications in alignment with study milestones and in response to site queries has proven effective for engaging and continually bringing sites back to the protocol. Following implementation of this recruitment communication campaign, this study has seen:

92%
of new sites retained. All sites are reading communications and 68% also interact with study resources

75%
of subsequent site queries relating to patient eligibility, with a median study expert response time of 12 minutes

75%
site open rate for study communications
(compared 7% average email open rate)

9%
higher open rate for localized
Japanese communications

10x
more monthly site engagement
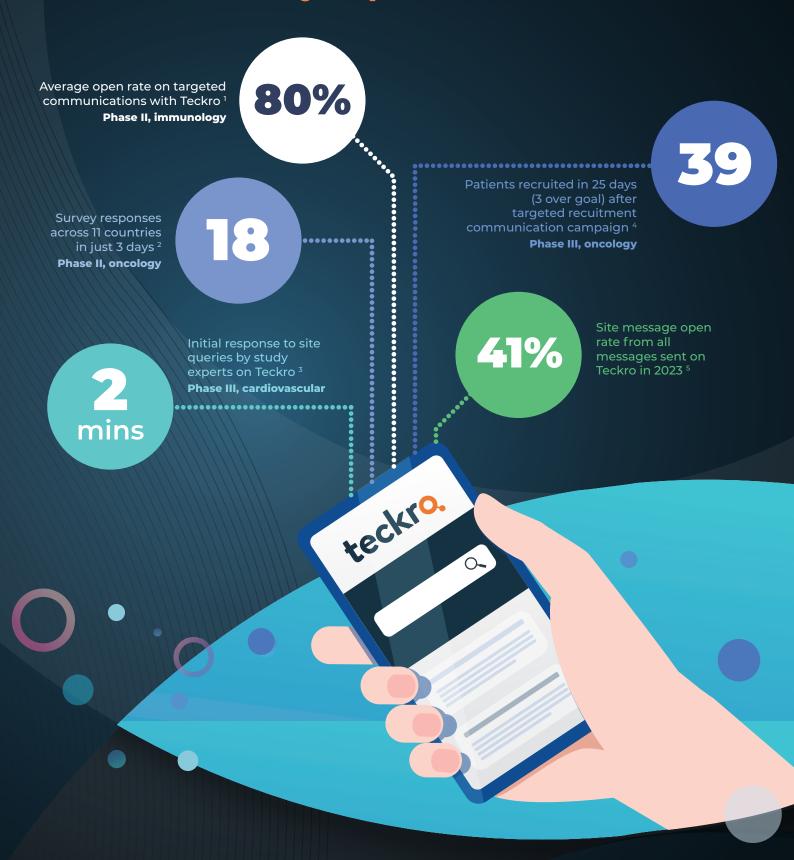(compared to other e-clinical solutions)

Keeping Pace with Top-Performing Sponsors

Amid capacity and resource constraints and site frustration with portals and passwords, adoption of trial technology solutions can be poor. Sponsors achieve best-in-class site adoption and engagement rates when they interconnect their study content and communication with Teckro. No longer hindered by "never-where-they-need-them" paper documents and endless indiscriminate emails, site staff prompted by native push notifications can check-in with your study directly on their mobile phone, anytime anywhere.

Sites register, read messages and review or browse study resources in a secure, intuitive app. This recurring study interaction drives protocol familiarity, triggers further site questions that help you shape continually useful outreach, and keeps your study top of mind. Ensuring communications are targeted and relevant captures the attention of both new and more mature sites. Site interest is held by continuing to deliver valuable messages to the right people at the right time, beyond SIV and through the various phases of your study.

More Study Impacts from Teckro

80%

Average open rate on targeted communications with Teckro [1]
Phase II, immunology

18

Survey responses across 11 countries in just 3 days [2]
Phase II, oncology

2 mins

Initial response to site queries by study experts on Teckro [3]
Phase III, cardiovascular

39

Patients recruited in 25 days (3 over goal) after targeted recuitment communication campaign [4]
Phase III, oncology

41%

Site message open rate from all messages sent on Teckro in 2023 [5]

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[1] Global study (50 sites, 10 countries, 150 patients)
[2] Survey sent on Teckro around recruitment barriers related to inclusion/exclusion criteria
[3] Call center model replaced on all studies with Teckro
[4] Global study (21 countries, 650 patients)
[5] 95% above what's considered a good open rate by HubSpot (at time of writing)

Now What?

Static to dynamic. Passive to proactive. Hindsight to here and now.

A shift in thinking is required to enhance the site experience and successfully build and sustain site engagement. Alongside adoption of a longer-term perspective, study teams must recognize communication as the backbone of authentic relationships with site staff.

Truly hearing and understanding what your sites need and consistently striving to meet them where they are will lay a solid foundation for trust and genuine reciprocity. Earned, reliable engagement with your study supports collaboration and progress at pace towards collective goals - it's mutually beneficial and, in our experience, reflected in study outcomes.

> *"With Teckro, we've consolidated communication and taken a campaign approach so local study teams and sites can access all essential study documents and receive weekly and bi-weekly study updates conveniently in one location - anywhere anytime, from their phone or computer."*

Global Study Manager

> *"The value of Teckro is that there's a desire now to not send memos and investigator letters due to the formality and the back and forth required. With Teckro, the message is reaching all users and there is no requirement for them to formally acknowledge them as the study team has visibility on who is opening and reading these messages."*

Global Study Manager

> *"We use Teckro to drive the recruitment that we need and make sure that our recruitment will be met on time."*

Global Study Manager

Teckro digitally interconnects your study. One app for all resources and all stakeholders. Our unique design spotlights centralized collaboration as a key facet of operational efficiency. Use this playbook and take action with Teckro's unique solution to implement a robust, impactful site relationship strategy - with effective, timely, targeted communication at its heart.

If you want to enhance your plan for effective outreach and get tips for improving the site experience on your study - we can help, reach out to our team to request guidance now.

Contact Us