

ACCELETRIAL SITE PRIMER · FOR CLINICAL OPERATIONS TEAMS

Building Stronger Site Relationships for Clinical Trials *by Leveraging AI*

Strong site relationships are critical to the success of clinical trials. Sites are not just vendors; they are partners responsible for delivering reliable, high-quality data and ensuring patient retention. This primer outlines a modern, AI-enabled, partnership-first approach to engaging and activating trial sites.

Not sure where to start? Ask us how we can help you implement these recommendations effectively.

01 SECTION 01 Strategic Site Identification

Identify the right sites through AI-driven evidence, not reputation or guesswork.

01

Patient Access

AI-driven predictive models to verify real patient availability.

02

Operational Capabilities

Assess site type, infrastructure, staffing, and past trial execution, not through audits but through collaborative dialogue and data-supported validation.

03

Knowledge Retention

Leverage AI-driven summaries of prior site engagement and knowledge already captured, stored, and reviewed to identify partnership opportunities.

02 SECTION 02 Feasibility That Respects Time and Adds Value

Use AI tools to ensure feasibility questionnaires are frictionless, transparent, and fair to the site.

01

Frictionless

Ask only what is essential to execute the trial protocol.

02

Transparent

Use a centralized tool to share feasibility forms, timelines, and Q&A, with no email attachments or spreadsheets.

03

Time-Bound

Set clear deadlines for completion (for example, 5 business days) and guarantee review, next step, and final decisions.

04

Ending the Knowledge Gap

Most sponsors lack a central repository tracking what studies the sites have already completed for them. Without it, sites waste time repeating themselves. Use AI to aggregate historical data.

03 SECTION 03 Re-Designing the Pre-Study Visit (PSV)

Schedule virtual PSVs when the site already has history with the sponsor.

01

Summarize and Validate

Use AI to summarize previous engagements and validate new requirements for the trial protocol, within a fixed number of days post-feasibility approval.

02

Agendas and Data Capture

Use AI-generated agendas and data capture to minimize manual notes and ensure completeness. Structured, focused questions that get to the core of the site's setup to support the trial protocol.

03

Enhance Site Experience

Use AI to deliver shorter, structured virtual sessions with pre-submitted documents reviewed by AI before the meeting, with clear follow-up actions that build trust and collaboration, not just compliance.

04

SECTION 04

Clear, Prompt Communication for Site Selection

Use AI to generate a customized commitment letter and keep site startup simple.

01

Clear Outline

The letter outlines team roles, contact information, timelines, and next steps.

02

Collaboration

Provide immediate access to start-up templates and platforms for centralized collaboration.

03

Limit Systems Overload

When more than three platforms are required, trial operations become unruly: endless logins, training, and updates that pull attention away from patient care. Use AI to centralize, integrate, consolidate, or enable APIs to minimize the platforms sites must use for a single trial.

05

SECTION 05

AI-Supported Activation and Planning

Compress activation timelines while protecting patient safety and trial integrity.

01

Contracts and Budgeting

Use AI protocol-driven budgets matched to FMV benchmarks to reduce negotiation time.

02

Drug Supply

Use AI to predict usage patterns and logistics to avoid supply gaps that could compromise patient safety or trial integrity.

03

Regulatory and Ethics Approval

AI drafts regulatory documents and executive summaries to streamline submissions.

04

Investigator Training

Precise, accurate training to execute the protocol, with AI converted into a training manual.

05

System and Tools Training

AI learning summaries to facilitate operational efficiency with tools.

06

SECTION 06

Supporting Site Needs with Enrollment and Patient Care

Meet sites where they are, supporting them with technology, tools, and training that reduce complexity and enhance capacity. Critical needs include:

01

Patient Identification Through EHR/EMR Mining

AI can scan health records to match eligibility criteria, flag qualified patients, and prioritize by location and readiness, turning patient recruitment from a needle-in-a-haystack search into a streamlined process.

02

Patient Outreach and Engagement

With natural language processing (NLP) and conversational AI, sponsors can equip sites with pre-approved, patient-friendly trial explanations, chatbots that answer common patient questions, and multilingual materials that explain risks and benefits in plain language. This helps patients feel informed and reduces site staff burden in repetitive education.

03

Reducing Recruitment Burden on Sites

AI automates tasks like patient list generation, reminders, and recruitment tracking, freeing coordinators to focus on relationships instead of admin.

04

Building Trust and Transparency

AI can analyze community sentiment and patient feedback to help sponsors understand why certain patient populations hesitate to join, what messaging builds trust, and how cultural or socioeconomic factors impact enrollment. Sponsors can then provide sites with tailored communication strategies that resonate locally.

05

Consistent Patient Messaging

Sponsors can equip sites with AI-powered chatbots and multilingual education tools that answer common patient questions, explain trial details in plain language, and provide consistent, pre-approved messaging.

07 SECTION 07 Practical Strategies for Supporting Sites

Meet sites where they are with tools that reduce complexity and enhance capacity.

01

Patient-First Scheduling Tools

Use AI to recommend visit windows based on patient availability, clinic capacity, and weather. This minimizes no-shows and ensures more predictable site operations.

02

Pre-Packed Patient Visit Kits

Just as “go bags” reduce chaos at home, standardized visit kits reduce variability and delays. Include labeled forms, pre-filled patient logs, lab kits, and IP tracking sheets.

03

Digital Patient Tracking Boards

Give sites an easy way to monitor where patients are in their protocol journey. Include reminders for key milestones and alerts if a visit is overdue or missed.

04

Emotional Load Awareness

Sponsor and CRO leads should have regular syncs with sites focused solely on support: what is working, what is breaking, and how to help. Not just status updates.

05

Evening and Weekend Site Support

Recognize when sites are operating under duress. Offer access to real-time tech support or protocol guidance outside typical 9 to 5 hours, when many patient issues arise.

06

Backup Systems for Patient Care

Plan for site staff outages with rotating support contacts and shared digital SOPs. When coordinators call out, the system should still support patient needs with minimal disruption.

07

Smart Nudges and Predictive Flags

Use AI to watch for early signs of site distress (missed queries, overdue reports, slow enrollment) and trigger early support before issues cascade.

08

Checklist-Centered Thinking

Embed operational checklists into site platforms: pre-visit prep, patient follow-up tasks, lab processing steps, and safety follow-ups. A good checklist is a silent assistant for busy staff.

09

Centralized FAQ Libraries

Create dynamic, AI-searchable libraries of protocol-specific guidance, past clarifications, and key contacts. Sites should never have to guess or wait days for a CRO to respond.

10

Time-Saving Templates

Offer ready-to-use SOPs, delegation logs, patient visit schedules, and communication scripts that require minimal customization, so site staff can focus on care, not document formatting.

CONCLUSION · PARTNERING, NOT AUDITING

Strong site relationships start with respect and communication. Replace vendor-style audits with partnership-style collaboration. Let AI remove administrative friction so your team and the site can focus on the shared mission: delivering clinical research that matters, and caring for patients with excellence every step of the way.

Not sure where to start? Ask us how we can help you implement these recommendations effectively. Reach the team at www.acceletrial.com.