CLINICAL RESEARCH RECRUITMENT & RETENTION
Tools, Tips, & Resources

Advisory Council for Clinical Research (ACCR)
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HELLO!

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Recruitment & Retention Services Manager

Communicator
Background in public health, health communication / marketing, & health literacy

Research Nerd
Est. 2005
Driven by helping people make use of research

High five enthusiast
Come get one!
Today’s objectives:

1. Why does recruitment & retention matter?
2. How do I develop a recruitment & retention strategy?
3. What resources can help you?
1. RECRUITMENT & RETENTION MATTERS
Why does recruitment & retention matter?

- Development and dissemination of scientific discoveries
- Timeliness of research
- Data validity and integrity
- Costs and completion of trial
- Health care access
- Competitiveness of research site

11% of sites fail to enroll a single patient

37% of sites do not meet their enrollment goals

Journal of Clinical Oncology [http://jco.ascopubs.org/content/21/5/830]
What are some of YOUR BIGGEST CHALLENGES in recruitment and retention?
What are some of THE BIGGEST HELPERS for your recruitment and retention?
Why don’t people participate in clinical trials?
WHAT ARE YOU ASKING FOR?

It’s more than participation. You are asking for…

▸ Attention
▸ Time
▸ Energy
▸ Learn something new and not easy to understand
▸ Change from their normal
▸ Overcome confusion and discomfort about research
▸ Personal information
▸ Miss out on things they’d normally be doing (i.e., opportunity costs)

6 vs. 2 AVERAGE # OF TOUCHPOINTS needed for a consumer to make a decision in 2015 vs. 2000
SO MUCH INFO, SO LITTLE TIME.

4000 ADS PER DAY

121 EMAILS PER DAY

8 SECONDS OF ATTENTION

304 TEXTS PER DAY

1440 MINUTES IN EACH DAY

ESSENTIAL will always OUTWEIGH what YOU ARE ASKING THEM TO DO.

2. WHERE WE NEED TO GO

Developing a recruitment & retention strategy
RECRUITMENT & RETENTION FUNNEL

Patients Available

Eligible

Willing

Qualified

Pre-Screen

Consent Process

Screening

Drop-Outs

Understand the Ratios and Reasons

XX%

XX%

# Completed Patients

XX%

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RETHINKING THE RECRUITMENT & RETENTION FUNNEL

DECISION-MAKING isn’t that straightforward

TWO-WAY communication

INFORMATION tidal wave

USER-DRIVEN & EXPERIENCE FOCUSED

MINDSET SHIFTS as one engages
RETHINKING THE RECRUITMENT & RETENTION FUNNEL

More of an **ECOSYSTEM**

1. Person considers an initial set of choices, based on perceptions and exposure to recent touch points.
2. People add or subtract options as they evaluate what they want.
3. Ultimately, person selects option at the moment of action.
4. After engaging in action, person builds expectations based on experience to inform their next decision journey.

PARTICIPANT JOURNEY

Understand audience:
- Needs
- Problems
- Goals
- Anxieties

Can help you:
- Identify opportunities
- Proactively address barriers & concern
- Clear the path & connect dots in their experience
- Right participants, right study for the right reasons at the right time.
ULTIMATELY, YOU’RE TRYING TO ANSWER:

OUT OF ALL OF MY CHOICES, WHY SHOULD I CHOOSE THIS PATH WITH YOU?
UNDERSTANDING YOUR PARTICIPANT JOURNEY

Empathy Map

▸ Tool used to gain perspective on needs, wants, hopes, and fears

▸ Help you empathize and synthesize your observations and draw out unexpected insights

▸ Creates shared understanding about participants’ needs and aids in decision-making

▸ “Our users need a better way to ______ BECAUSE ______.”
UNDERSTANDING YOUR PARTICIPANT JOURNEY

Guiding Questions

▸ What do you want someone to do?
▸ What does a typical day look like in their world?
▸ Which pains can you resolve?
▸ Which gains can you offer?
▸ What are they thinking about when they resist what you’re offering?
▸ Is this a positive or painful experience for them?
▸ Which anxieties can you take away?
▸ Which habits do you need to overcome?
3. HOW WE GET THERE

Creating the paths and walking them together
• Know protocol
• Audience(s) of interest (NOT JUST PATIENT)
• Situation Analysis
• Study timeline & budget

Discovery

Development
• Objectives
• Messages
• Strategies & Tactics
• Source Docs
• Tracking tools

Implementation
• Outreach
• Place ads
• Pre-screening
• Interactions w/ participants

Evaluation
• Process & Outcome
• Report & Share
• Adapt strategy

RECRUITMENT PLANNING & ACTION
TO PUT IT ANOTHER WAY...

1. Get to know YOUR WHO
2. Get clear on YOUR ASK & the WHY
3. Determine HOW MUCH
4. Decide YOUR HOW & WHERE
5. ADAPT & ADJUST as needed
RECRUITMENT TACTICS

- Print
- Digital
- Networks/Community

Image credit: http://www.slideshare.net/asijits/clinical-trial-recruitment-retention
BUT WHICH ONES SHOULD I USE?

- How does it align with your WHO?
- How does your WHO consume information?
- What PURPOSE will it serve in nurturing them through the recruitment & retention ecosystem?
- What is your budget?
- What is your timeline?
- Which can you realistically execute?
DEVELOPING YOUR CONTENT

▶ KNOW YOUR AUDIENCE!
▶ Be clear, concise, and relevant.
▶ Keep it simple – easy to use & understand
▶ Get visual.
▶ Make it actionable.
▶ You can and should REPEAT messages.
▶ Make it meaningful >>> WHY? SO WHAT?
DEVELOPING YOUR CONTENT | EXAMPLES

Northwestern University is researching ways to help people quit smoking by understanding their speech and language. Participants are needed for a study on how smoking habits can be recognized through speech and language analysis.

Interested? Call: 312-503-1317
Participants will be compensated for their participation.

Northwestern Medicine
Feinberg School of Medicine

IRB #18080201566
P: Dr. Bonnie Spring
Department of Preventive Medicine
DEVELOPING YOUR CONTENT | EXAMPLES

6X
LGBTQ youth are six times more likely to be depressed than their peers.

YOU'RE NOT ALONE.

VOLUNTEERS INVITED
Mobile App Study for Gay Young Men
Northwestern's Department of Preventive Medicine are doing a research on an app to help young men manage anxiety and depression.

This study may be a good fit for you if you:
▶ Are a 17-20 year old male
▶ Are attracted to other males
▶ Have recently had a depressed mood, less of interest, feelings of nervousness, or trouble controlling worry.

Participants will:
▶ Receive a mobile phone app or information about mental health resources at no cost.
▶ Be paid for your participation.

Interested or have questions?
Call or Text 312-884-9848
Email nustudy@northwestern.edu
DEVELOPING YOUR CONTENT

WHO
• Who is your “ideal participant”? 
• Get specific about who they are on multiple levels.

WHAT
• What do they need to hear from you & when? 
• What are your most influential touchpoints?

HOW
• How to craft the messages so that they will “hear” or “see” the information
• How you spread the messages

Why?
• Engagement is driven by content.
• Consistency. 
• Credibility. 
• Trust.

You want to create unifying connection between the WHO, WHAT, & HOW.
WHERE TO FIND HELP

This isn’t easy. If it were, you probably wouldn’t be at this talk.
SUPPORT AT NORTHWESTERN

CCR Recruitment & Retention Team
- Services, support, resources, templates
- nucatsrecruitment@northwestern.edu

Northwestern Enterprise Datawarehouse (EDW)
- nmedw@northwestern.edu
- Note: Currently on ‘soft freeze’ for new reports

Center for Community Health (CCH)
- CCH-Consult@northwestern.edu
SUPPORT AT OTHER PLACES

Trial Innovation Network: Recruitment & Retention Toolkit
- Services, support, resources, templates
- [https://trialinnovationnetwork.org/recruitment-retention-toolkit/](https://trialinnovationnetwork.org/recruitment-retention-toolkit/)
- Want to learn more? NUCATS-TIN@northwestern.edu

Clinical Trials Transformation Initiative
- Recommendations, Implementation Tools
- [https://www.ctti-clinicaltrials.org/projects/recruitment](https://www.ctti-clinicaltrials.org/projects/recruitment)
OTHER HELPFUL RESOURCES

CDC Gateway to Health Communication & Social Marketing Practice
- Audience Insights, Health Literacy tools, Campaign Development Resources & Templates
- https://www.cdc.gov/healthcommunication/index.html

Pew Research Center
- Topics of Interest: Media & News; Social trends; Internet & Tech
- Audience Insights, Information & Media Use Data/Trends
- http://www.pewresearch.org/
TAKEAWAYS

▸ It’s an ECOSYSTEM.
▸ You ARE NOT your audience.
▸ Always come back to:
  ▶ TIME people have;
  ▶ DECISIONS they have to make; and
  ▶ BEHAVIOR changes or shifts.

▸ Messages must be delivered WHERE, WHEN, and HOW people want it.
▸ Don’t just target, TAILOR.
▸ Engagement is CONTINUOUS.
▸ THERE’S INFORMATION & SUPPORT AVAILABLE FOR YOUR JOURNEY.
QUESTIONS? FEEDBACK? CONTACT US!

Connect with our Recruitment & Retention Team:
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