DrugDev
an IQVIA company

PREVENTING INFORMATION OVERLOAD

Using study portals to engage site staff

How many unread emails are currently sitting in your inbox at work? Be honest. As professionals, we've all seen or experienced the case of "I get too many emails to read them all." And, we've all probably experienced an important question or request falling by the wayside as a result.

For many sites, the overabundance of communications through email, system notifications, or other means isn't just common, it's standard. This state, commonly known as information overload, can have dire consequences. Sites often report an increase in stress levels, distraction, and delayed decision making. These effects can quickly compound, causing an otherwise engaged site to become overwhelmed, and adversely impacting their work and the trial at large.

To combat this, sponsors have been using study portals to employ a traditional mix of best practices and tailored communication styles. This approach works because it covers the core needs of all clinical trial sites while also addressing the two different types of site users:

THE ENGAGED USER: These are site staff that are constantly checking the study portal for new information. They typically take the time to retrieve documents, review FAQs and communications, explore visit guides, and so on.

THE DISENGAGED USER: These are site staff that infrequently log into study portals, and do not typically read through trial documents and communications.

STUDY PORTAL BEST PRACTICES FOR ALL USERS

In order to know what type of sites you're working with, check the login, document retrieval, and other "usage" stats that your portal logs. Regardless of the type, sponsors should follow these best practices to ensure that both site types can easily access important information.

Organize the study portal in a fashion that makes as many items as possible "self-service."

Create a centralized checklist that includes all site activation related activities.

- Define all items that must be completed for the site to be "active"
- Involve all vendors and certifications if they are necessary
- Provide clear instructions on how the task should be completed (e.g., outline expectations)
- Provide documents within the portal checklist and do not email them

Share all documents on a single platform.

- Again, no email!
- Carefully structure the document library in a user-friendly manner, use proper folder structure and document nomenclature

Provide complete and visible FAQs.

- Keep the FAQ in a standard location on the portal
- Regularly add updated content such as study clarifications, changes, and answers to site questions

TACTICS FOR ENGAGED SITES

For engaged site staff, it's important to cater to their desire to regularly check in and learn information. Sponsors can accomplish this by ensuring that all items available on the portal are current, and that there is no other place for sites to retrieve them (again, no email). This helps reinforce the "single source of truth" that all sponsors should seek by building the user's confidence in the portal.

Engaged sites should also be acknowledged when completing tasks, such as submitting documents that are required in the activation checklist. Sponsors that receive questions or clarifications from engaged sites should not only thank them for submitting, but also take the time to call them out on the homepage of the site portal (or an area where all sites can see), as well as add them to the FAQ. This fosters a culture of interaction while reinforcing the message that they're all in the trial together.

Last, sponsors should seek to remove some of the common frustrations attributed to study portals, such as outdated links, broken tools, or outdated information. Ensuring that these items are current, still work, and are stable with recent versions of popular internet browsers keep engaged sites happy and productive.

TACTICS FOR UNENGAGED SITES

When it comes to unengaged site staff, it's up to sponsors to create a basis of interaction that best suits the site. Simply put, sponsors should create a communications plan that involves the sponsor, the CRO, and all vendors and stick to it. For non-urgent messages, ask for messages to be shared with the Study team on "X" day of the week, with the goal of being distributed to sites on "Y" day of the week. Again, do not stray from this schedule. Urgent messages should still go out as soon as possible. However, sponsors should take a serious look at what it is considered "urgent." Sponsors should assign a single person (or more if needed) to be responsible for all incoming and outgoing communications for unengaged sites. This helps ensure the communications plan is followed.

Last, sponsors should send all communications to unengaged site staff in a manner that forms a habit. For instance, all news should be sent on "X" day of the week at "Y" time. This helps condition sites to expect updates on a certain day and time regarding the trial. Communications should also be formatted the same way each time. Over time, sites will learn to scan the news quickly for information they need the most.

UNDERSTAND AND ADAPT

While no tactic is guaranteed to work, sponsors that employ best practices while addressing the needs of their sites are best equipped to ensure that sites aren't overloaded, while still having all the tools and information needed to do their jobs. This is critically important in an era where the sentence "I get too many emails to read them all" is commonplace.

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