2013 CRO Quality Benchmarking – Phase II/III Service Providers
Industry Standard Research’s (ISR) “2013 CRO Quality Benchmarking – Phase II/III Service Providers” report provides pharmaceutical sponsors and clinical service providers with an independent and comprehensive analysis of CRO service quality and clinical outsourcing of Phase II/III clinical trial services.

In its 5th year, ISR continues to believe this annual report is the single most comprehensive source for data on the topic of CRO delivery quality and customer loyalty.

Major Sections:
1. Phase II/III Outsourcing Behaviors
   - Growth of clinical outsourcing
   - Anticipated future outsourcing activities for next 12 months
2. Sponsors’ Attitudes, Beliefs, and Intentions about Service Providers
   - Perceived leaders
   - Proposal volume
   - Service Provider usage
   - Cost experiences
   - Future usage preference
3. Service Provider Performance and Scorecards across Attributes
   - See page 3 of this preview for more details
4. Segment Selection Rubrics and CROs to Short List
5. Summary Outcome Measures: Service Variability and Customer Loyalty
6. Company Service Quality Profiles

What you will learn in this report:
- Performance of 29 Phase II/III CROs, measured across 26 critical dimensions of service quality
- How sponsors make their clinical outsourcing decisions, including which service attributes drive selection
- Attitudes, beliefs, and intentions for future outsourcing

How you can use this report:
- For buyers of clinical research service, this report offers insight into CRO service quality and empowers you to make smarter clinical outsourcing decisions by providing evaluation and selection tools.
- For clinical service providers, this critical report offers insight into your service quality, your competitors’ quality, buyers’ needs, CRO selection criteria, paths to differentiation, and clinical outsourcing trends and forecasts.

Valuable for:
Clinical Operations, Outsourcing, Service Provider Marketing and Business Development
ISR’s Service Provider Performance and Scorecards

ISR’s report includes 470 service provider evaluations of 29 CROs across 26 critical characteristics associated with service quality. Of these 29 service providers, 15 received full profiles (bolded below, based on respondent usage).

Companies Included
- Accenture
- Aptiv Solutions
- Bioclinica
- Charles River
- Chiltern
- Clinsys
- Cognizant
- Covance
- Davita Clinical Research
- DCRI-Duke
- Encorium
- Eurofins
- ICON
- INC Research
- Medpace
- Novella
- Paragon
- PAREXEL
- PharmaNet/i3
- PPD
- PRA
- Premier Research
- Quintiles
- Rho
- RPS
- SGS Life Sciences
- Tata
- Theorem
- World Wide Clinical Trials

Characteristics Measured

Staff Characteristics
- Project Manager Quality / Experience
- CRA Quality / Experience
- Therapeutic Expertise of the Project Team
- Project Team Chemistry
- Timely Project Communications
- Staff Turnover
- Commercial Market Knowledge
- Local Market / Regulatory Knowledge

Operational Excellence
- Up-front Contingency Planning and Trial Risk Management
- Speed of Site Start-up
- Data Quality
- Network of Sites and Investigators
- Meeting Overall Project Timelines
- Meeting Database Lock Timelines
- Meeting First Patient – First Visit Timelines
- Offers Innovative Solutions
- Speed of Sites / Investigator Recruitment
- Patient / Volunteer Recruitment Strategy
- Positive Experience with Service Provider
- Access to Real-time Data

Organizational & Finance Characteristics
- Breadth of Services
- Global Footprint
- Low Cost
- Minimizing Change Orders
- Overall Value
- Financial Strength and Stability
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**Cross-service Provider Performance**  
- Breadth of Services  
- Commercial Market Knowledge  
- CRA quality  
- Data quality  
- Financial strength/ stability  
- Global footprint  
- Local market / Regulatory knowledge  
- Low Cost  
- Meeting first patient / first visit timelines  
- Meeting overall project timelines  
- Minimization of change order  
- Minimizing staff turnover  
- Network of sites/ investigators  
- Offered innovative solutions  
- Patient/ volunteer recruitment strategy  
- Positive experience with service provider  
- Project manager quality  
- Project team chemistry  
- Speed of site / Investigator recruitment  
- Speed of site start-up  
- Technology for real-time access to data  
- Therapeutic expertise  
- Timely project communications  
- Up-front contingency planning, risk management  

**Respondent Demographics**  
- Company  
- Primary Area of Responsibility  
- Outsourcing Responsibility  
- Job Title  
- Phase Responsibility  
- Involvement in Clinical Development Process  
- Years in the Industry  
- Location  
- Therapeutic Area  

**Sample Data Points**  
- Lower cost or faster recruitment  
- Site selection and recruitment guarantees  
- Execution or design expertise and experience  
- Currently  
- Execution or design expertise and experience  
- 3 years from now  

**About Industry Standard Research**
Welcome to the 2013 edition of the CRO Quality Benchmarking study for Phase II/III services. Industry Standard Research is never short of reasons to monitor service quality. That said, for both CROs and the sponsors who purchase their services, the justifications for doing so are increasing in number. Phase II studies are bifurcating into either larger, more global studies or smaller, more complicated studies. Both of these require evolved and specialized capabilities. Phase III studies, for their part, simply continue to increase in size and scope, narrowing the field of CROs capable of performing the work.

As pharma company CFOs continue to sharpen their pencils – or at least make costs more predictable – the past 12 months have seen a continuation of the trend toward larger “partnership” agreements between sponsors and CROs. They are becoming more common, longer in duration, and encompass a broader and broader scope of services.

These dynamics point toward increasing focus on – and demand for – CRO services. But they also heighten the need for vigilance toward service quality.

Industry Standard Research continues to believe this report is the single most comprehensive source for data on the topic of CRO delivery quality and customer loyalty. This year 157 representatives from 77 different trial sponsor organizations gave us their perspectives on – and experiences with – 29 different service provider organizations. In total, we received ratings on 470 service encounters.

There is a wealth of information in the report for both sponsor companies and CROs.

**For Sponsors**

Sponsors should focus their attention on the Service Provider Scorecards and Segment Selection Rubric sections. Data in these sections will provide sponsors with the ammunition to make informed selections of CROs. Specifically, sponsors will understand which CROs lead and which lag the industry on 26 important determinants of effective trial conduct including: Project Manager Quality, Timelines Management, Therapeutic Expertise, Data Quality, Price, and many more. In addition, sponsors will learn how consistently each CRO performs across these attributes and how loyal their customers are. We believe that using such information makes for more successful relationships between sponsors and their service providers.

Sponsor companies that take the time to understand the data and use it to formulate challenging questions for their potential CRO partners will increase their chances of outsourcing success.

**For CROs**

Genuine differentiation is extraordinarily difficult to achieve in the delivery of complex services. Use the Service Provider Performance data to benchmark your company’s delivery quality and shape its operational and marketing strategies. In addition, spend a significant amount of time in the Study Data section of this report. It contains a wealth of data on more topics than we can cover in the analysis section of the report.

On the whole, CROs that put the data to use in their Operations and Marketing strategies will be better prepared to meet customer needs and take a greater share of the outsourced clinical development market.
Figure 1 – “Staff Characteristics” Ratings

Responses have been randomized. Data available in the full report.
If preference drives less than half of service purchase decisions, what drives the rest? ISR’s data would suggest that sponsors are making a ______ judgment that is more important than any other drivers. But looking one level deeper will probably allow readers to understand what drives the assessment of _______. At that level ISR finds ________, ________, and ________ to be the dominant drivers of project decisions...

Most Important Service Provider Attributes

"Please review the following attributes and select the 5 most important to you when selecting a provider for Phase II/III services." (Base = 157)

"Among the following attributes, please select the 1 most important to you when selecting a provider for Phase II/III services." (Base =157)

- CRA quality
- Data quality metrics
- Global footprint
- Low cost
- Metrics for meeting overall project timelines
- Network of sites/ investigators
- Overall value
- Patient/ volunteer recruitment strategy
- Perceived overall value
- Prior positive experience with service provider
- Project manager quality
- Therapeutic expertise
- Up-front contingency planning, risk management
- Metrics for database lock timelines
- Commercial market knowledge
- Technology for real-time access to data
- Change order minimization metrics
- Staff turnover metrics
- Metrics for site start-up
- Metrics for first patient / first visit timelines

Responses have been randomized. Data available in the full report.
Sample Data Points

Lower cost or faster recruitment
“Would you prefer...?”
(N=157)

- 20% lower cost of a study
- Reaching patient recruitment goals 10% faster within the study

Site selection and recruitment guarantees
“Would you prefer...?”
(N=157)

- A CRO offer you recruitment guarantees driven by them controlling site selection
- To maintain control over site selection with no recruitment guarantees
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