Decentralized Clinical Trial Products PEAK Matrix® Assessment 2021

July 2021

Contents

For more information on this and other research published by Everest Group, please contact us:

Nitish Mittal, Vice President

Chunky Satija, Practice Director

Nisarg Shah, Senior Analyst

Contents

01

Introduction and overview

- Research methodology
- Key information on the report
- Background of the research
- Focus of the research

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

PEAK Matrix®, market maturity, and technology adoption/investment

02

Primary sources of information

Annual contractual and operational RFIs, service provider briefings and buyer interviews, and web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers

Proprietary contractual database of life sciences IT Services (ITS) contracts (updated annually)

Year-round tracking of all major life sciences IT service providers

Dedicated team for life sciences outsourcing research, spread over three continents

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing decisions

Executive-level relationships with buyers, service providers, technology providers, and industry associations

This report is based on four key sources of proprietary information

- Proprietary database of IT services contracts of major IT service providers and product vendors, with life science IT services in scope of work (updated annually)
- The database tracks the following elements of each contract:
  - Buyer details including size and signing region
  - Contract details including service provider, contract type, TCV & ACV, service provider FTEs, start & end dates, duration, and delivery locations
  - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed

- Proprietary database of IT service providers and product vendors (updated annually)
- The database tracks the following for each service provider / product vendor:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different Lines of Business (LOBs)
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed

- Service provider and vendor briefings
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment

- Buyer reference interviews, ongoing buyer surveys, and interactions
  - Drivers and challenges for adopting workplace services
  - Assessment of service provider performance
  - Emerging priorities
  - Lessons learned and best practices

Product vendors assessed

accenture, castor, Clinical Ink, COVANCE, DELVEHEALTH, ERT, eClinicalHealth, IQVIA, Jeeva Informatics, Medable, MEDIDATA, ObvioHealth, SIGNANT HEALTH, Science 37, THREAD

Source: **The source of all content is Everest Group unless otherwise specified**
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract-specific will only be presented back to the industry in an aggregated fashion

Background of the research

Decentralized Clinical Trials (DCTs), in which clinical trial data is collected through sensors or remote monitoring devices carried by a patient without the need to visit a site, can deliver many benefits to pharmaceutical companies, including cost savings, better patient recruitment and retention, and improved data quality. Before the COVID-19 pandemic, although the technology and literature to support DCTs existed, there were only a few pilots being conducted as enterprises grappled with regulatory uncertainties, upfront capital investment in sensors and products, and limited functionalities to decentralize clinical trials. In recent times, DCTs have proved to be a saving grace to restart paused clinical trials. Additionally, recent technological advances, the proliferation of wearables, and FDA's push to the industry to adopt DCTs following the COVID-19 situation have made the DCT landscape ripe for disruption.

Numerous start-ups that address DCT requirements have recently emerged. The landscape has also experienced heavy fundraising and M&A activity. Through co-innovation, continuous product improvement, and market education, DCT vendors are focusing on increasing trust, speeding trial timelines, and delivering a smooth experience in running DCTs.

In this report, we assess the capabilities of 15 IT vendors specific to decentralized clinical trial products. These vendors are mapped on the Everest Group PEAK Matrix®, which is a composite index of a range of distinct metrics related to a vendor's capability and market impact. We focus on:

- The landscape of vendors for decentralized clinical trial products
- Assessment of the vendors on several capability and market success-related dimensions

Scope of this report:

Geography
Global

Industry
Life sciences (biopharmaceuticals, medical devices, and Contract Research Organizations or CROs)

Vendor offering
Decentralized clinical trial products

Decentralized clinical trial products | Scope of the research

In this report, Everest Group focuses on products that enable decentralized clinical trials

Scope of assessment

Digital touchpoints				
Patient applications	Physician and nurse applications	Investigator applications	Concierge portals	CRA portal

Core modules

Trial start-up	eConsent		
Trial conduct	Wearable technology & BYOD integration + Remote patient monitoring	Medication adherence	eCOA/ePRO
		Televisits	

Auxiliary support services

Patient screening services	Patient recruitment and enrolment services	
Home nursing services	Patient concierge and engagement services	Medical record review services
Drug and device provisioning	Remote CRA	

Mode of conduct

Completely virtual	Hybrid (Digitally-enabled trials)

Virtual trial platform features

Centralized connected devices, eCOA, and eConsent data	Integration of workflows with traditional clinical development systems	Unified nursing experience	Secure and compliant

Technology enablers

Cloud	Data management	IoT	Reporting & analytics	IT security	Mobility	Automation	AI

Source: Everest Group (2021)

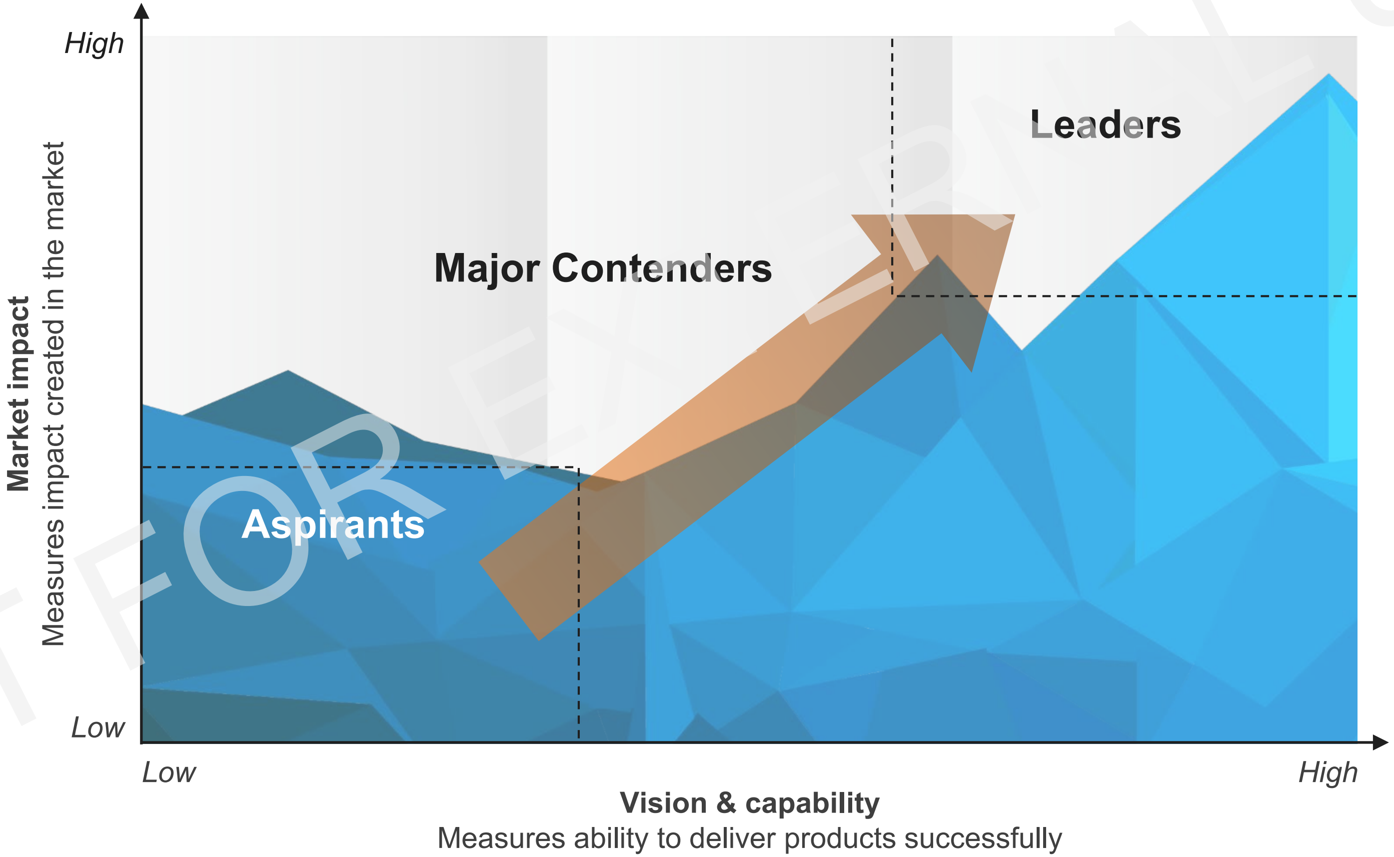
02

Decentralized clinical trial products PEAK Matrix® characteristics

- PEAK Matrix framework
- Everest Group PEAK Matrix for decentralized clinical trial products
- Product vendor capability summary dashboard
- Characteristics of Leaders, Major Contenders, and Aspirants

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix



Products PEAK Matrix® evaluation dimensions

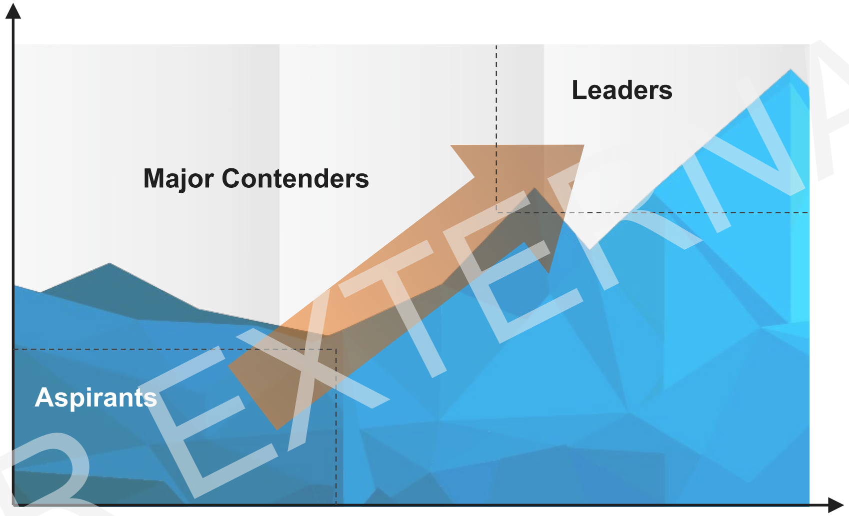
Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth

Portfolio mix
Diversity of client base across industries, geographies, environments, enterprise size class

Value delivered
Value delivered to the client based on customer feedback and other measures

Market impact



Vision & capability

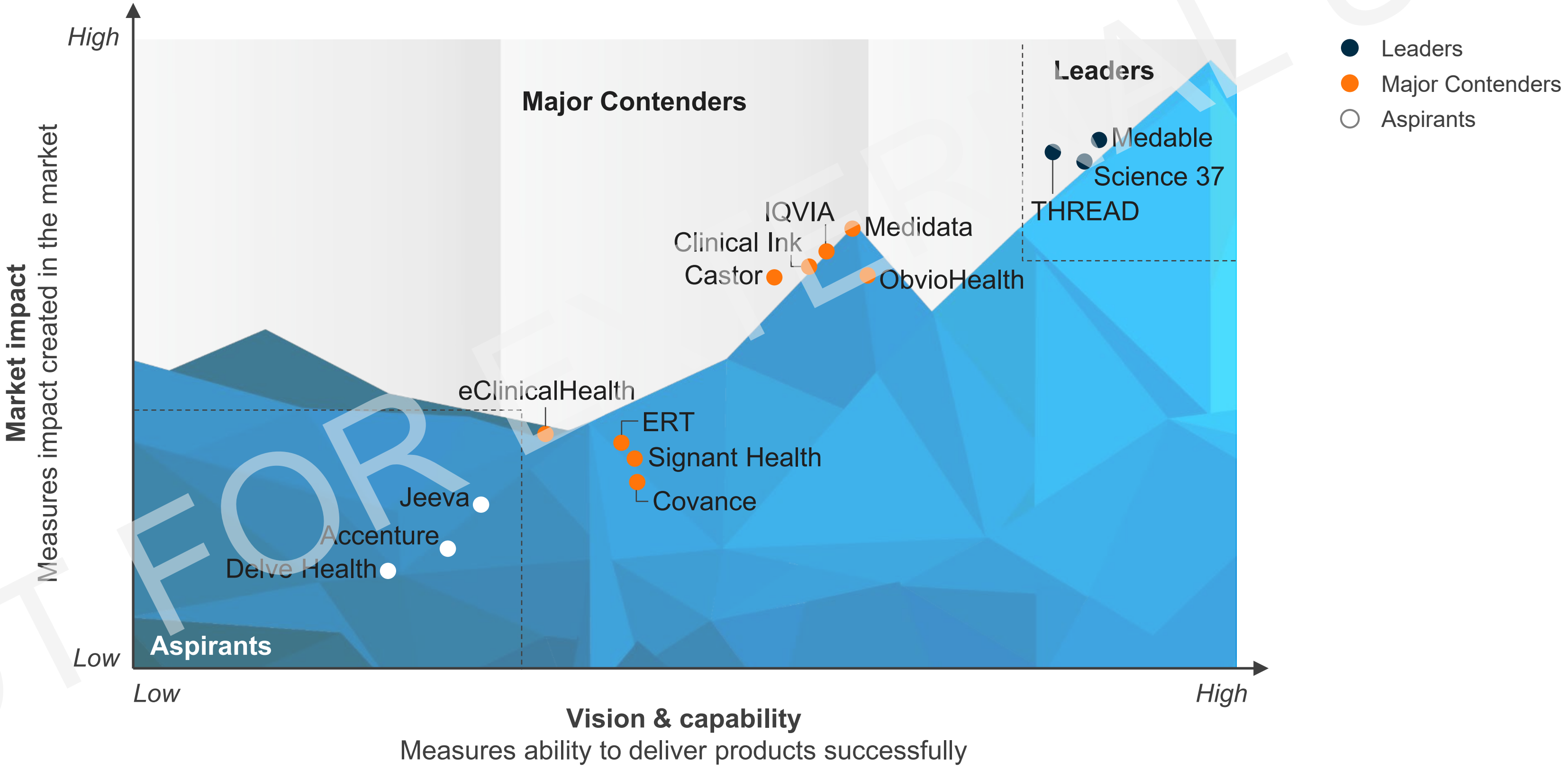
Measures ability to deliver products successfully. This is captured through five subdimensions

Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support
Vision for the client and itself; future roadmap and strategy	Technical sophistication and breadth/depth across the technology suite	Configurability/customize-ability, hosting and tenancy, integration, governance, and security and compliance	Progressiveness, effectiveness, and flexibility of engagement and commercial models	Training, consulting, maintenance, and other support services

Everest Group PEAK Matrix®

Decentralized Clinical Trial Products PEAK Matrix® Assessment 2021

Everest Group Decentralized Clinical Trial Products PEAK Matrix® Assessment 2021[1,2]



1 Assessments for Covance, Delve Health, eClinicalHealth, ERT, and Signant Health excludes product vendor inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, product vendor public disclosures, and Everest Group's interactions with decentralized clinical trial product buyers

2 Analysis for Signant Health is based on capabilities after its acquisition of Virtrial, analysis for ERT is based on capabilities after its merger with BioClinica, and analysis for Covance is based on capabilities after its acquisition with SnapIoT

Source: Everest Group (2021)

Decentralized clinical trials products PEAK Matrix® characteristics

Leaders:

Medable, Science 37, and THREAD

- Leaders offer clients an end-to-end modular platform with a unified data model which allows all patient data to be in a single repository, eliminating data silos
- Leaders offer not only the DCT platforms but also the auxiliary services required to run a DCT. Science 37 offer all the auxiliary services in-house whereas Medable and THREAD partner with home health nurse networks and other service providers to offer clients complete coverage where internal capabilities don't exist
- Leader DCT products are ranked high on user and patient experience, and they offer advanced use cases to clients (such as advanced analytics and patient recruitment campaigns) to enable them to run their DCTs
- Leaders are also witnessing high growth and are investing in hiring executives for product improvement, growth, and strategy execution
- Clients perceive Leaders to be premium-priced vendors as compared to Major Contenders and Aspirants

Major Contenders:

Castor, Clinical Ink, Covance, eClinicalHealth, ERT, IQVIA, Medidata, ObvioHealth, and Signant Health

- Major Contenders do not have an end-to-end platform for enabling DCTs as clients cite they lack a unified data layer. However, they offer all point solution capabilities to run DCTs
- Similarly, most Major Contenders do not offer the complete spectrum of auxiliary support services (either through partnership or in-house)
- Some major Contenders such as Clinical Ink and ERT offer solutions with technologically superior capabilities such as the ability to manage complex eCOAs as compared to the leaders
- While Major Contenders products are price competitive, they may lack capabilities such as medication adherence or fall behind on desired patient experience

Aspirants:

Accenture, Delve Health, and Jeeva

- While Aspirants may have products for running DCTs, the solutions are relatively new or undergoing pilots and therefore undergoing continuous improvement
- Aspirants do not offer clients the complete suite of DCT products and lack capabilities such as televisits, medication adherence, etc. Individual products also currently lack advanced features as offered by Major Contenders and Leaders
- Aspirants such as Accenture also focus more as a system integrator or custom solution developer for clients, rather than a vendor of DCT products

Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trial products 2021

Leaders

Measure of capability: Low High

Product Vendor	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Medable										
Science 37										
THREAD										

Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trial products 2021

Major Contenders

Measure of capability: Low High

Product Vendor	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Castor										
Clinical Ink										
Covance										
eClinicalHealth										
ERT										
IQVIA										
Medidata										
ObvioHealth										
Signant Health										

Summary dashboard | market impact and vision & capability assessment of providers for decentralized clinical trial products 2021

Aspirants

Measure of capability: Low High

Product Vendor	Market impact				Vision & capability					
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Accenture										
Delve Health										
Jeeva Informatics										

03

Enterprise sourcing considerations

- Leaders
  - Medable
  - Science 37
  - THREAD

Medable

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Medable can offer its suite of products as an end-to-end platform with a unified data model – this allows all patient data to be in a single repository, eliminating data silos. Clients have appreciated Medable's ability to offer a single application for everything
- Clients rate Medable's DCT products high on user experience, ease of integration with their existing solution suites, and patient centricity
- Medable offers a superior support experience, with a strong escalation pathway
- Medable offers clients the flexibility to use the products in a SaaS-only model or leverage auxiliary support services such as device provisioning, digital concierge, etc.
- Medable is focusing its investment efforts on leadership hiring to improve product portfolio and improve patient experience

Limitations

- Clients rate Medable as a premium priced vendor for running their DCTs
- The integration between wearables and sensors with Medable's product suite is not seamless, and clients cite integration challenges while collecting data through some sensors or wearables. Similarly, clients state that the eSource integration with EMRs can be improved
- Clients expect Medable's eCOA solution to offer advanced functionalities as offered by specialized eCOA players such as complex eCOA libraries and functionalities
- Medable's primary focus areas are North America and Europe. It has lesser focus on the APAC geography for DCTs as compared to other vendors

Science 37

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Science 37 can offer its suite of products as an end-to-end platform with a unified data model – this allows all patient data to be in a single repository, eliminating data silos
- Science 37 allows clients two modes of operation: Metasite™, which has both the platform and auxiliary services; and a SaaS-only option. Clients appreciate this operating model flexibility provided by Science 37
- Apart from being customizable and flexible, Science 37's products have been ranked very high on user experience and user friendliness
- The setup time for Science 37 suite of products is short. The team's speed of work has also been appreciated by clients
- They are competitively priced and flexible during negotiations

Limitations

- Clients cite that Science 37's mobile nursing capabilities need to improve, and that the operations team is not the best for executing remote patient health data collection and visits
- The integration of Science 37's DCT solutions with the internal applications used by their clients have been cited to be a challenge. Similarly, clients have stated challenges with accessing clinical and patient data while integrating with Science 37's solutions
- Science 37 is not able to meet client expectations when it comes to tackling pieces such as running complex eCOAs and associated patient reported outcomes

THREAD

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- THREAD can offer its suite of products as an end-to-end platform with a unified data model – this allows all patient data to be in a single repository, eliminating data silos. The solutions are also able to integrate wearable data into a single source of truth
- THREAD is very responsive to client needs and feedback
- Clients view THREAD as an innovative vendor and appreciate the use cases it is launching, such as advanced analytics for predicting patient retention
- THREAD has a good understanding of not only the software, but also the wearables which would be suitable for a study as per the client requirements; THREAD adopts a consultative approach to advice clients on how to decentralize and launch studies and design protocols appropriately
- The solutions are easy and quick to deploy on the client environment

Limitations

- THREAD adopts a technology-first approach while pitching their products that may result in communication gaps. The company tends to focus heavily on the technology stack during deal solutioning, whereas the clients expect a more business-oriented focus in such deals (such as ClinOps, etc.)
- THREAD needs to increase and develop focus on client-facing sales roles as there is presently an over reliance on the CEO during sales pitches
- Clients state that THREAD needs to build more expertise for product and staff teams around clinical data management
- THREAD's telemedicine solution is more expensive; clients also state that THREAD's solutions are priced higher than competitors

03

Enterprise sourcing considerations

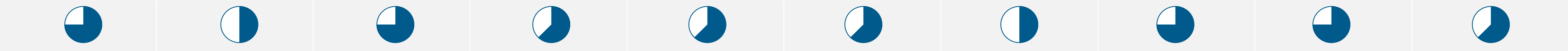
- Major Contenders
  - Castor
  - Clinical Ink
  - Covance
  - eClinicalHealth
  - ERT
  - IQVIA
  - Medidata
  - ObvioHealth
  - Signant Health

Castor

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall



Strengths

- Clients appreciate the speed, innovation, flexibility, and above all, the cost of Castor's product suite
- Castor is quick to address issues that clients might face with the products
- The user experience of the Castor products is rated very good by clients
- Castor has a transparent and standardized pricing model that is dependent on the client (size and industry) and study request (single study vs. bulk vs. subscription); clients state that the product suite is competitively priced
- Castor has strong expertise and previous experience to run Software as a Medical Device (SaMD) trials on its suite of products

Limitations

- Castor positions itself as a self-service DCT provider and has limited partnerships to offer clients auxiliary services; this reduces the value proposition and flexibility to deliver the product and service combination that is beneficial to clients
- Clients state that Castor's delivery capabilities in the US can improve – they desire for a stronger US presence as the time difference can sometimes be a problem when most of their trials are happening in the US. They also note that Castor has taken effort in the last six to eight months to expand its presence in the US
- There is no seamless integration between various Castor solutions such as eCOA and eConsent. Clients state that they desire a single login across these solutions
- In order to be an end-to-end platform vendor for DCTs, Castor needs to offer capabilities for televisits and medication adherence, which are currently on the product release roadmap

Clinical Ink
Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Clients appreciate Clinical Ink's ability to offer functionalities and design scales for measuring complex eCOAs. Clinical Ink know the space of eCOA very well
- Clinical Ink is more flexible as compared to its peers; clients have stated the Clinical Ink has a "stellar" tech support
- Clients rate Clinical Ink high on domain expertise and coverage across multiple therapeutic areas; they are also willing to take on complex assessments and tackle hard pieces that other vendors do not
- Clients state that Clinical Ink goes above and beyond its scope of work to improve the engagement. As a result, it is more flexible to client needs and requests
- The real-time data capture and BYOD approach of Clinical Ink is a differentiator

Limitations

- Clients have struggled with getting the data out of the systems in the right formats
- Clinical Ink provisions its own tablets at the site. Site users have stated that there is a big learning curve associated with the tablets and as a result, there have been usage and access challenges
- The company is perceived to be a premium priced player by clients
- Clinical Ink does not offer all the auxiliary support services such as patient screening, patient recruitment, home nursing, remote CRA services which are valuable to run DCTs
- Clients do not believe that Clinical Ink has an end-to-end integrated offering for running DCTs. Also, Clinical Ink needs to use a third-party application for integration of telehealth capabilities

Covance

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Covance's acquisition of SnapIoT augments its DCT capabilities, and offers clients products from SnapIoT and auxiliary services owing to Covance's CRO heritage
- SnapIoT also provides clients additional capabilities such as patient randomization, patient diaries, BYOD support, and reporting and insights
- SnapIoT has partnered with vendors such as Actigraph and Clincloud to augment remote patient monitoring capabilities for its products
- SnapIoT focuses on deploying solutions faster and at lesser cost as compared to traditional solutions, thus allowing sponsors and CROs control of their delivery timelines

Limitations

- SnapIoT's products are point solutions, and not an end-to-end DCT platform
- Covance or SnapIoT has limited thought leadership content or consultative capabilities to help clients decentralize their clinical trials or provide insights into DCTs; there are limited case studies or success stories about its work with clients on decentralized clinical trials
- There are limited capabilities to check for patient adherence in DCTs

Note: The analysis includes DCT capabilities through Covance's acquisition of SnapIoT

eClinicalHealth

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- eClinicalHealth, through its DCT offering, ClinPal, has been helping clients decentralize their studies since 2011
- eClinicalHealth has experience conducting DCTs across multiple therapeutic areas and a wide range of geographies
- ClinPal has partnered with Dreem, Investis Digital, Trials@Home to help clients with carrying out DCTs in various therapeutic areas

Limitations

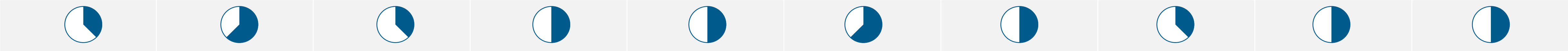
- eClinicalHealth has not kept abreast with the innovation exhibited by the DCT vendors and does not offer capabilities for televisits
- It does not offer auxiliary support services to clients and positions itself as a self-service platform for running DCTs. There are no partnerships with CROs or home nurse networks that leading vendors engage to augment the value proposition of the platform
- eClinicalHealth has limited thought leadership content or consultative capabilities to help clients decentralize their clinical trials or provide insights into DCTs

ERT

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall



Strengths

- ERT's eCOA capabilities are capable of support complex assessments and rater scales and have been adopted across various therapeutic areas such as mental health, oncology, CNS, etc. The eCOA solutions also work with a wide variety of audio and video capabilities that enhances evaluation of a drug's efficacy
- ERT's expertise in imaging capabilities closely integrate with their eCOA solutions to introduce security, improve image identification, and analysis
- ERT's merger with BioClinica offer clients additional capabilities for clinical development such as CTMS, EDC, RTSM solutions
- ERT has good data analytics capabilities and has capabilities to showcase data insights, business intelligence to stakeholders about the eCOA and study progress

Limitations

- ERT's focus is on point solutions, and primarily eCOA solutions. There are limited partnerships to offer clients access to auxiliary support services in DCTs
- ERT does not have capabilities to monitor patient adherence in DCTs. Its virtual visits solution was also recently launched in 2020
- Public reviews by clients have cited communication issues with ERT, which has been a point of delays and hassle

Note: The analysis includes DCT capabilities through ERT's acquisition of BioClinica

IQVIA

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Due to its CRO heritage and global footprint, IQVIA can support client requirements for DCTs globally. It is also able to provide a wide combination of technology and auxiliary service offerings depending on client requirements
- Clients appreciate IQVIA's support services and cite that it is quick to resolve queries and action items
- IQVIA has good domain expertise and is able to advise clients on designing their trials from a DCT perspective
- Clients have leveraged IQVIA's product in a fast-paced COVID trial situation; they claim that the size of the study, speed of enrolling patients, and conducting the study was impressive

Limitations

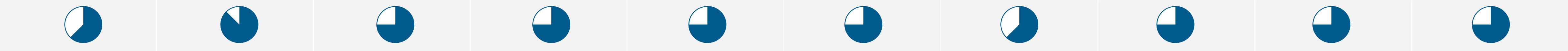
- Clients do not think that IQVIA has an end-to-end platform for running DCTs; they do not have a unified data layer to support the end-to-end perspective. As a result, there are integration issues between various product suites
- Clients cite that IQVIA is a premium priced player and at times, also charges program management fees along with their suite of DCT products
- The user experience of the product suites needs to improve. Public patient ratings available on Android and iOS playstore state that the app is designed well but keeps crashing, is slow, and clunky
- Clients state that the planned upgrades are sometimes delayed and there are certain challenges that have arisen post implementation of new updates

Medidata

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall



Strengths

- Clients appreciate the quality of services being offered by Medidata for running their DCTs; the Medidata team is also ranked high on domain expertise around DCTs
- The company's DCT solutions are highly rated on governance, security, and compliance
- Medidata's suite of DCT products integrate well with client environment; clients have also cited that they value the ability to create a single form within the Medidata RAVE EDC and supply it to the patient – this single integration is an added plus as they had to code it separately for each application for other vendors
- Its patient insights program is a useful mechanism to improve existing suite of DCT products, while taking the patient and client voice into consideration

Limitations

- Clients state that the user experience of Medidata's DCT products needs to improve
- Medidata is perceived to be a premium priced vendor for running DCTs
- Medidata's DCT products are not end-to-end as they do not have a unified data layer. Clients state that a unified data layer has been designed but not implemented and would still need some work as it is in the early stages of usage as an end-to-end product
- While clients view Medidata as an innovative organization, they cite that DCT-native vendors have caught up in the DCT space and are innovating faster than Medidata

ObvioHealth
Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- ObvioHealth gives clients the choice to opt for products along with auxiliary support services; they also excel at designing campaigns for patient recruitment across various social media
- Apart from serving pharmaceutical and medical devices clients, ObvioHealth also has a client roster in the consumer health and nutrition area
- Clients appreciate ObvioHealth's proactive work style and client management capabilities
- Clients view ObvioHealth as an innovative vendor in the DCT space, owing to its real-time dashboards and their capabilities to capture and manage complex rating scales

Limitations

- Clients state that while ObvioHealth is flexible with its pricing, it is not competitively priced and that its price points are higher than peers
- Clients expect a faster setup time for their suite of DCT products
- The user and patient experience of their product suite can improve
- ObvioHealth has a heavy focus on DCTs for small-sized clients and in the APAC market. Therefore, its ability to successfully cater to medium and large clients remains to be tested

Signant Health
Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Signant Health, through the acquisition of Virtrial, is able to serve a broad ecosystem of sites, CROs, and sponsors. The acquisition also augments its existing ePRO capabilities with VirTrial's DCT capabilities in eConsent and televisits
- The company is able to offer clients auxiliary support services such as patient concierge. In addition to this, it provides consulting services to enable decentralization of trials
- Signant Health's televisit capabilities are superior to its peers
- It has created content to help clients navigate across challenges with conducting DCTs in various therapeutic areas such as CNS and dermatology

Limitations

- Signant Health does not have an end-to-end platform for DCTs but rather point solutions which can be deployed on client environment
- The company does not have capabilities to track patient medication adherence via weekly reminders or notifications to patients
- There are limited investments in advanced analytics use cases or patient-centered design

Note: The analysis includes DCT capabilities through Signant Health's acquisition of VirTrial

03

Enterprise sourcing considerations

- Aspirants
  - Accenture
  - Delve Health
  - Jeeva Informatics

Accenture

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
									

Strengths

- Accenture's consulting expertise enables it to counsel clients to decentralize clinical trials; it offers consulting expertise around a wide range of areas such as protocol design and business casing for DCTs
- Its system integrators capabilities allows it to implement vendor solutions for DCTs, custom build capabilities for clients' DCT requirements, and offer data expertise and integrations to enable smooth communication between DCT and traditional clinical technology products
- As the products are part of the overall INTIENT platform, Accenture DCT products offer clients good data management capabilities, the ability to integrate with EMR and device data, and a good overview of clinical data insights

Limitations

- Accenture's INTIENT solution does not support televisit capabilities for conducting DCTs. It has recently released their eConsent and eCOA capabilities (in April 2021) that indicates limited success stories for these products
- Clients state that Accenture tends to focus heavily on the technology stack during deal solutioning. Clients desire a more business-oriented focus in such deals through effective business casing of the existing technology use cases
- Accenture's DCT products do not have advanced analytics use cases or the innovation that peers are driving in the space; its focus is that of a system integrator or custom solution provider, rather than a DCT product vendor

Delve Health

Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Delve Health has partnerships in home nursing and patient screening to provide auxiliary support services to clients
- Its ePRO solutions have capabilities to measure ePerfO, eClinRO, and eObsRO

Limitations

- Delve Health has limited capabilities for medication adherence and does not have adequate capabilities for remote patient monitoring via wearable integration. Some capabilities such as eConsent and virtual visit solutions have been recently released in 2020
- Apart from Apple Watch, Delve Health products have limited capabilities to integrate with other wearables for capturing sensor data
- Delve Health has limited consultative capabilities and thought leadership to help clients decentralize their clinical trials

Jeeva

Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall

Strengths

- Clients state that Jeeva Informatics is willing to customize its solutions as per their requirements. Their experience while using the products is that the suite is less complicated, easy to use, and the webpages are less congested versus the other peers
- Clients appreciate Jeeva Informatics' quick support services and continued support even post business hours; their issues are resolved almost immediately

Limitations

- Jeeva Informatics' suite of products are still undergoing pilots with academic research organizations and hence, there is limited patient and user feedback from sponsors and sites
- Jeeva Informatics currently has no capabilities for televisits and medication adherence
- There are limited partnerships to offer a holistic portfolio of products and services; currently Jeeva has positioned itself as a self-service offering for running DCTs

04

Appendix

- Glossary

Glossary of key terms used in this report

Aspirants	Aspirants are the third set of service providers / vendors rated by Everest Group, according to Everest Group's proprietary scoring methodology. They have moderate experience and delivery capability
AI	Artificial Intelligence is the simulation of human intelligence and decision-making capability by machines
BYOD	Bring Your Own Device. Refers to being allowed to use one's personally-owned device, rather than being required to use an officially provided device
CRO	A Contract Research Organization is an organization that provides research services to firms in the life sciences industry on a contract basis
DCT	Decentralized Clinical Trial. DCTs are defined as studies executed through telemedicine and mobile/local healthcare providers, using processes and technologies differing from the traditional clinical trial model
eConsent	It is the use of electronic systems and processes that may employ multiple electronic media, including text, graphics, audio, video, podcasts, passive and interactive web sites, biological recognition devices, and card readers, to convey information related to the study to obtain and document informed consent
eCOA	Electronic Clinical Outcomes Assessment. eCOAs are a method of capturing outcomes data electronically in clinical trials. eCOA employs technologies such as handheld devices, tablets, or the web to allow trial participants, physicians, and caregivers to directly report information related to healthcare outcomes
ePRO	Electronic patient-reported outcome. ePROs allow patients to answer questions and report on their health through an electronic device, such as a smartphone or tablet
IoT	Internet of Things refers to a system or a network and connected devices such as computers and sensors, which can interact through data exchange and use analytics algorithms to make decisions
ITS	Information Technology Services is the transfer of ownership of some or all information technology processes or functions to a service provider. This could include core, administrative, delivery, or management-related processes or functions
Leaders	Leaders are the highest rated service providers/vendors, according to Everest Group's proprietary scoring methodology, with top quartile performance across market success and capability
LS	Life Sciences – Everest Group defines the life sciences industry to include organizations in the fields of pharmaceuticals, biotechnology, and medical devices
Major Contenders	Major Contenders are the second-highest rated service providers / vendors, according to Everest Group's proprietary scoring methodology, with second or third quartile performance across market success and capability
Televisits	Televisits are a safe and secure way for you to connect to a doctor remotely, via video and audio connection either on a smartphone or a computer

Everest Group®

With you on the journey

Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at **www.everestgrp.com**.

Stay connected

Website
everestgrp.com

Social Media
@EverestGroup
@Everest Group
@Everest Group
@Everest Group

Blog
everestgrp.com/blog

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-647-557-3475