

## Clinical Research Site Technology Strategy a template

Technology is revolutionizing clinical trials by streamlining study conduct - but, adding site-owned technology without a strategy can end up creating more complex challenges like too many logins or complicated integrations.

Use our Technology Strategy Template to help your site add the right technology to help you with your studies and to increase the positive impact of technology for site staff.

### Your Goals

Think about the goals you have for your research site in the next 3-5 years. Some of these might include reducing study start up by X%. Or decreasing patient dropout by X%. Or to reduce staff time spent.

1. What are your goals for your site in the next 1-3-5 years?

a. In one year, our site will

b. In three years, our site will

c. In five years, our site will


Let's break down what you need to do in order to hit that one year goal.

1. What do you need to do to reach that goal?
  - a. Define your initiative and break it into (3) milestones:

i. Initiative to hit the goal is \_\_\_\_\_

1. Milestone (1)

2. Milestone (2)

3. Milestone (3)


2. What resources will you need to complete this initiative?

- a. Set a budget for staff time and also technology needs

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## Key Stakeholders

Now let's think about who the key stakeholders are in making this goal happen.

**b.** Expertise needed to drive initiative

**i.** Internally

**ii.** Outside tech partners


**c.** Roles required

**i.** Who will lead this initiative and what are their responsibilities?

**ii.** Who will support this initiative and what are their responsibilities?

**iii.** Who will need to be informed and what are their responsibilities?


## Enabling Technology

What tools will you need to hit these goals for your site? What should you look for in a tech company?

**1.** What is the company's history in the industry?

**2.** Is the technology purpose-built for sites?

**3.** Does the technology integrate with other systems? Or is that on you?

**3.** Is the technology validated?

**3.** Is the technology company a partner or a vendor?


## Tracking Success

And finally, let's begin with the end in mind. What do you want to report on at the end of year one?

- d. Metrics with the outcome in mind:
  - i. What is the outcome you want to report on?

- 1. **Internal auditing**  
What metrics are you going to use in the internal audits?

- 2. **Staff Satisfaction**  
What metrics do you want to track over time?

- 3. **Effort**  
Track pre and post effort requirements linked to each technology implementation


- ii. How are you going to report on each of these?
      - 1. Create a spreadsheet
      - 2. Set the same time each week or month to complete reporting

With tracking, make sure you tweak as you go and iterate as necessary.

For more information on choosing technology for your site, check out our [Guide to eRegulatory Software here](#).