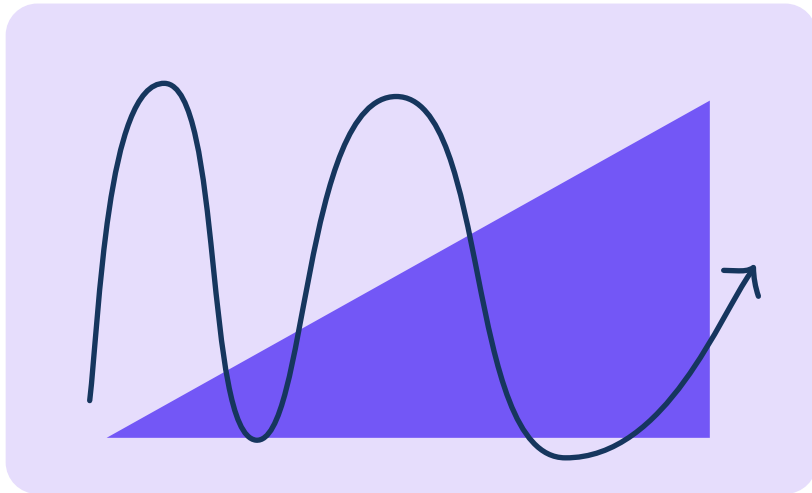


MedSurvey's Heartbeat Approach

**Strategically Managing Panel
Partners to Deliver More
Completes, Faster**

How MedSurvey used the heartbeat approach to fully recruit a complex project while slashing time in field by nearly half.

Overview



Project Details

Type/Topic: Annual SLE Patient Chart Audit (Global)

Methodology: Quantitative - Sample Only (U.S.)
Quantitative - Full Service (E.U.)

Audience: Rheumatologists

Countries: 6 (5 in E.U.)

Languages: 5

Sample Partners: 4 (U.S.)
5 (E.U.)

Project Overview

New clients often come to us because their projects that should go smoothly are instead crashing and burning. It's especially frustrating when targets, incentives, and timelines are all reasonable.

What I think is happening is that sample companies have an incentive to resist bringing on other partners because it's complicated and expensive. As a result, they often try to exhaust their own panels before considering partnering out.

We think about projects differently, and a great example of that is what we call the Heartbeat Approach. We develop a strategy for each project to bring on the right partners at the right time so the project never stalls.

The following case is a great example of the heartbeat approach in action. A company was struggling with an ATU study that went way over time and budget. This case study details how applying the heartbeat approach saved the project and completed it on budget and in half the time.

I hope you enjoy,



Gen Geyler
Chief Solutions Officer

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The Takeaway

A life sciences consultancy came to MedSurvey with a global longitudinal study that previously ran 6 weeks over the projected time in field and 40% over budget.

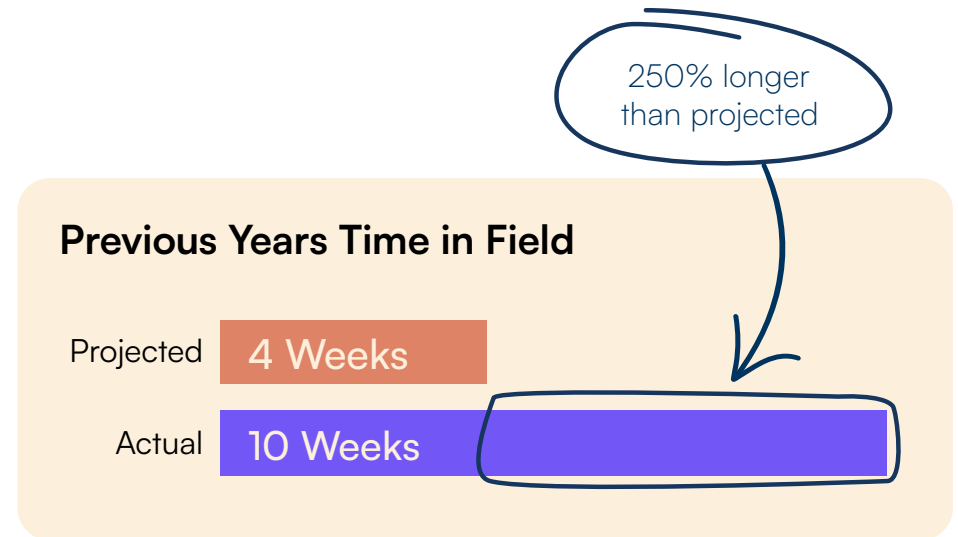
MedSurvey implemented their heartbeat approach—a strategy for coordinating panel partners that prevents respondent engagement from flatlining and keeps projects on track.

MedSurvey completed the study in a little over half the time spent the year before, and well within their projected timeframe and budget.

The Challenge

A life sciences consultancy approached MedSurvey about an annual study they had been running with another sample provider: an SLE patient chart audit targeting rheumatologists in the U.S. and 5 countries in the E.U.

In the previous year, **their sample provider had exceeded the estimated timeframe in the E.U. by more than twice the time they had projected.** It took them 70 days (10 weeks) to reach their target recruitment, compared to their initial estimate of 20-28 days (3-4 weeks).



Strife and Escalation

This 6-week delay was so problematic for the company that their CEO had to become involved with calls at the project level. The costs of extending the timeframe were also passed directly on to the client, contributing to **a final price 40% higher than the original bid.** “It was a big deal for us,” The company’s associate director explained. “After the initial timelines were delayed, things just spiraled. Adding 30 extra days blew our budget, had a big business impact, and wasted a lot of people’s time.”

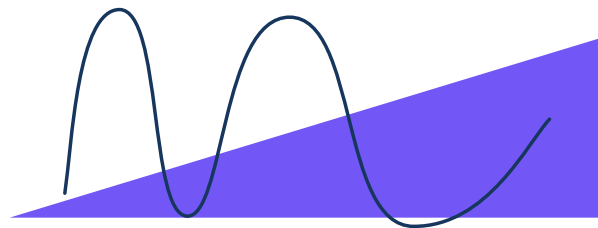
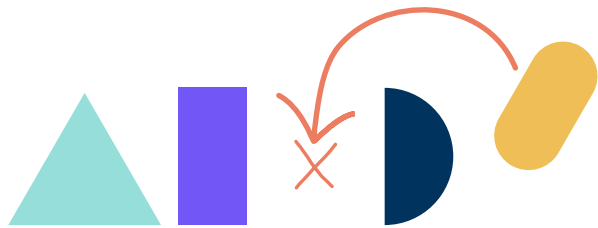
“Adding 30 extra days blew our budget, had a big business impact, and wasted a lot of people’s time.” - Associate Director

What Went Wrong

- ✱ A lack of an effective fielding strategy, most likely focusing on project profitability rather than completes, blew past timelines and budgets.
- ✱ A lack of transparency and proactive project management meant wasted time and energy, all the way up to the CEO.

The Approach

Solving complex recruiting projects requires expertise, planning, and proven strategies. MedSurvey's project managers have **an average of 20 years** in the industry, which gives them the expertise to build the right plan, manage the project and employ MedSurvey's heartbeat approach to recruiting.



A Detailed Plan

A good plan needs to identify partners, estimate the number of completes for each partner, and then develop a schedule for onboarding them .

Expert Project Management

Many projects require coordination across numerous panels, and in multiple countries. Sophisticated plans need to be run by industry insiders with years of experience.

The Heartbeat Approach

Plan and execute a project so that the response rate doesn't ever flat line. Instead, partners are brought on at a rational cadence to keep responses coming in until the project is complete.

THE APPROACH

A Detailed Plan

From the beginning, MedSurvey designed a detailed plan for onboarding and managing panel partners. Using their deep familiarity with specific panel vendors' approaches, strengths, and challenges, MedSurvey selected five trusted panel partners for the E.U. portion of the project and created an overlapping schedule for onboarding each vendor in each country, mapping out project completion using predictions of vendor performance based on historical data. The result was a comprehensive strategy utilizing MedSurvey's heartbeat approach.

01

Identify Partners

Leverage deep familiarity with trusted panel partners to select the ideal partners for maximizing completes.

02

Develop Schedule

Design an overlapping onboarding schedule for each specific country that will fully saturate panels and account for panelist overlap.

03

Estimate Completes

Estimate the number of completes over time to allow us to measure vendor performance in real-time.



“At MedSurvey, we really understand how panel response works, and how much setup we need to do upfront to make sure the project goes smoothly in field. And the more experience you have working with these types of studies, the more you're going to be successful.” - Rob Rich, Senior Project Manager

THE APPROACH

Expert Project Management

MedSurvey's senior project manager for this study, Rob Rich, used his 30 years of market research experience to coordinate the five panel partners and monitor trends in respondent engagement. Combining his expertise with historical data, he was able to effectively execute the heartbeat approach, accurately predict dips in recruitment, and proactively deploy sample to new panel partners.

As a result, respondent engagement never flatlined; instead of the project stalling, the total number of completes continued to rise steadily. By maximizing the potential of each panel partner, MedSurvey's heartbeat approach kept the project recruiting consistently and on schedule.

“Rob really kept the project on track. He’s a great communicator and gave us confidence that we were in good hands.”

- Associate Director

30+
Years of
Experience



About Rob Rich

Rob Rich is a Senior Project Manager who brings 30 years of industry experience and broad knowledge of therapeutic areas and research methods to each project he runs. Rob believes market research is as much about people as data, and he takes pride in building rewarding client relationships.

THE APPROACH

The Heartbeat Approach

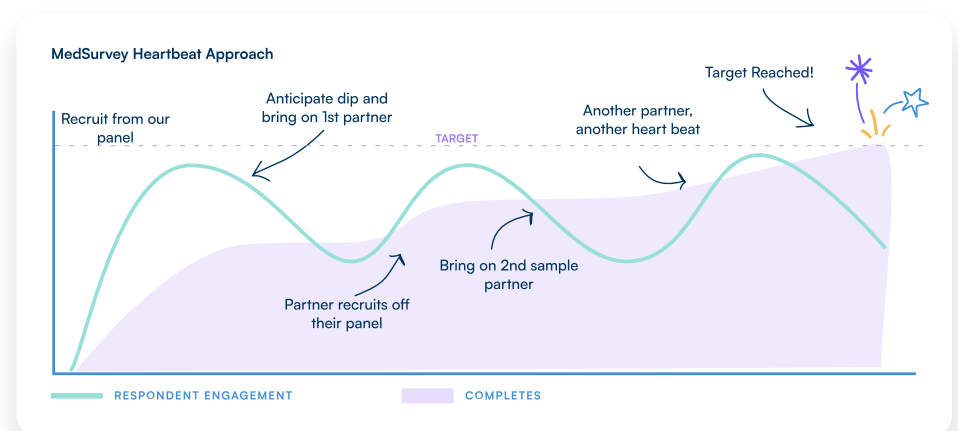
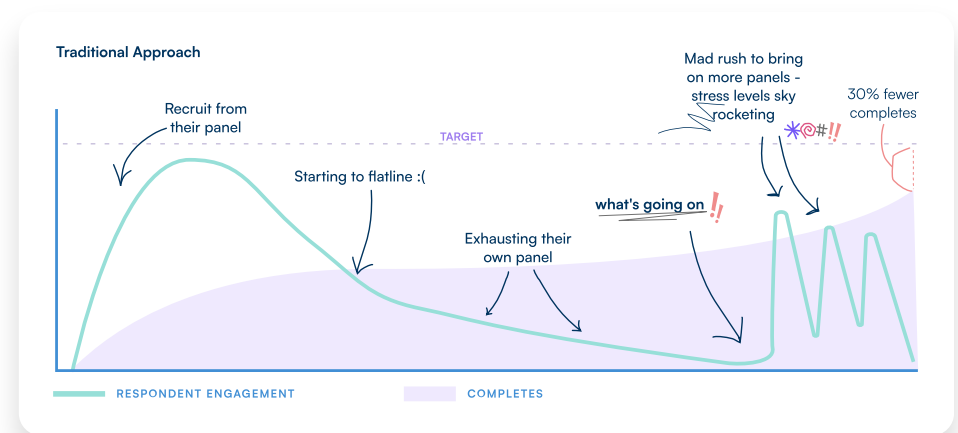
MedSurvey's heartbeat approach is a proactive approach to bringing on panel partners, prioritizing completes and avoiding project delays.

The Traditional Approach

The heartbeat approach differs from the traditional approach to panel partners that most sample vendors employ. In the traditional approach, sample companies continue to prioritize recruitment from their own panel well after respondent engagement has begun to decline in an attempt to exhaust their panel. Only after responses have flatlined and the project has stalled do they rush to bring on additional panels.

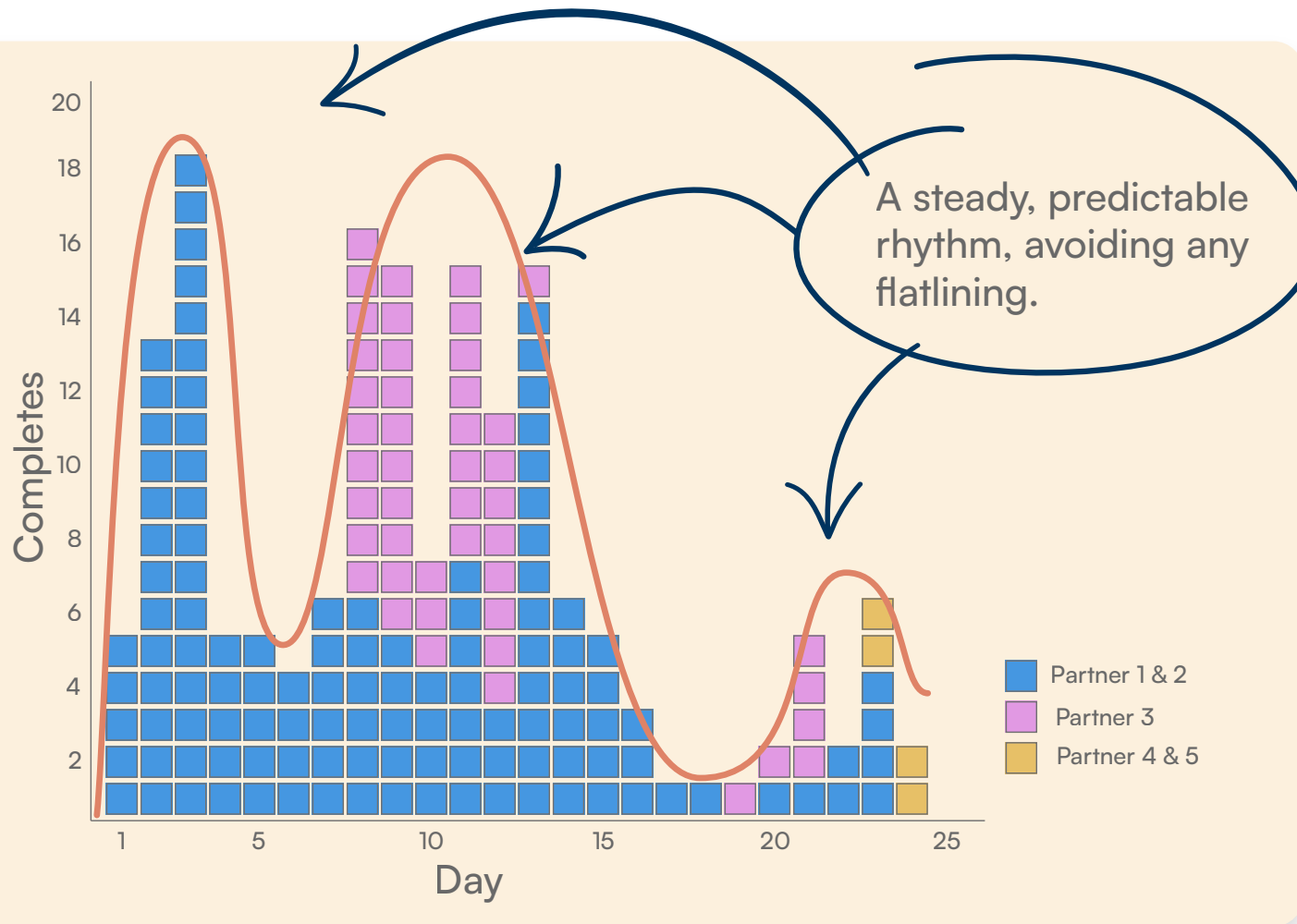
The Heartbeat Approach

By contrast, MedSurvey begins by recruiting from the strongest panel, but by anticipating dips in respondent engagement, they bring on the next panel partner before the project can start to flatline. Then they follow a regular cadence of onboarding additional partners at a predetermined schedule so that the project moves forward in a nice, healthy rhythm, like a heartbeat. This approach means a smooth fielding experience with no 11th hour fires.



The Heartbeat Approach in the Wild

Survey completion data for three E.U. countries (Germany, Italy and France) were merged and plotted. Five partners were onboarded in three phases resulting in the expected heartbeat wave pattern.



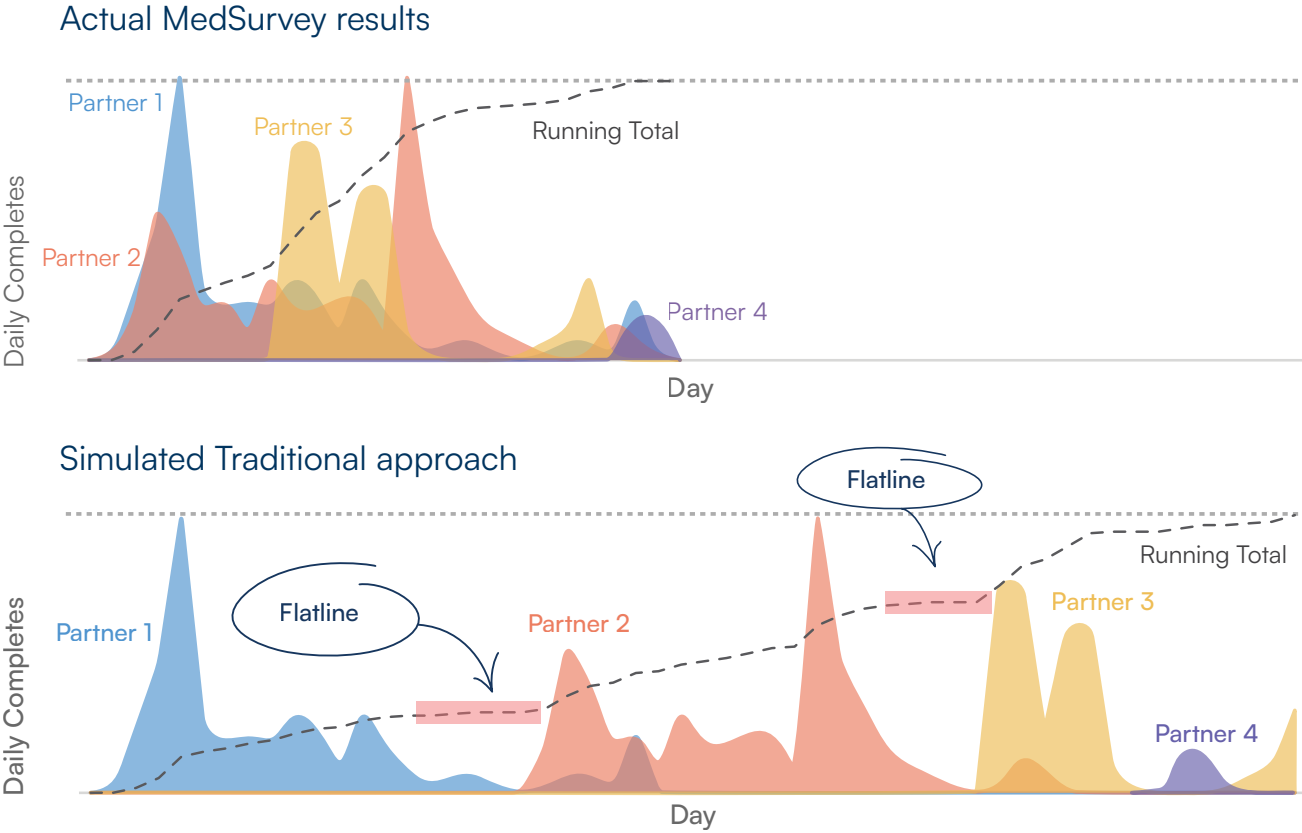
✳ Three groups of panel partners were onboarded in an overlapping fashion.

✧ This avoided any flatlining of the project and maintained a healthy project rhythm.

★ Adopting this approach sets accurate expectations, transparent project status, and no last-minute fires.

Heartbeat Comparison

To illustrate the impact of the heartbeat approach, the following two graphs show MedSurvey’s recruitment data from 3 E.U. countries compared with a simulated traditional panel-saturation approach using the same data.



2x Faster Recruitment

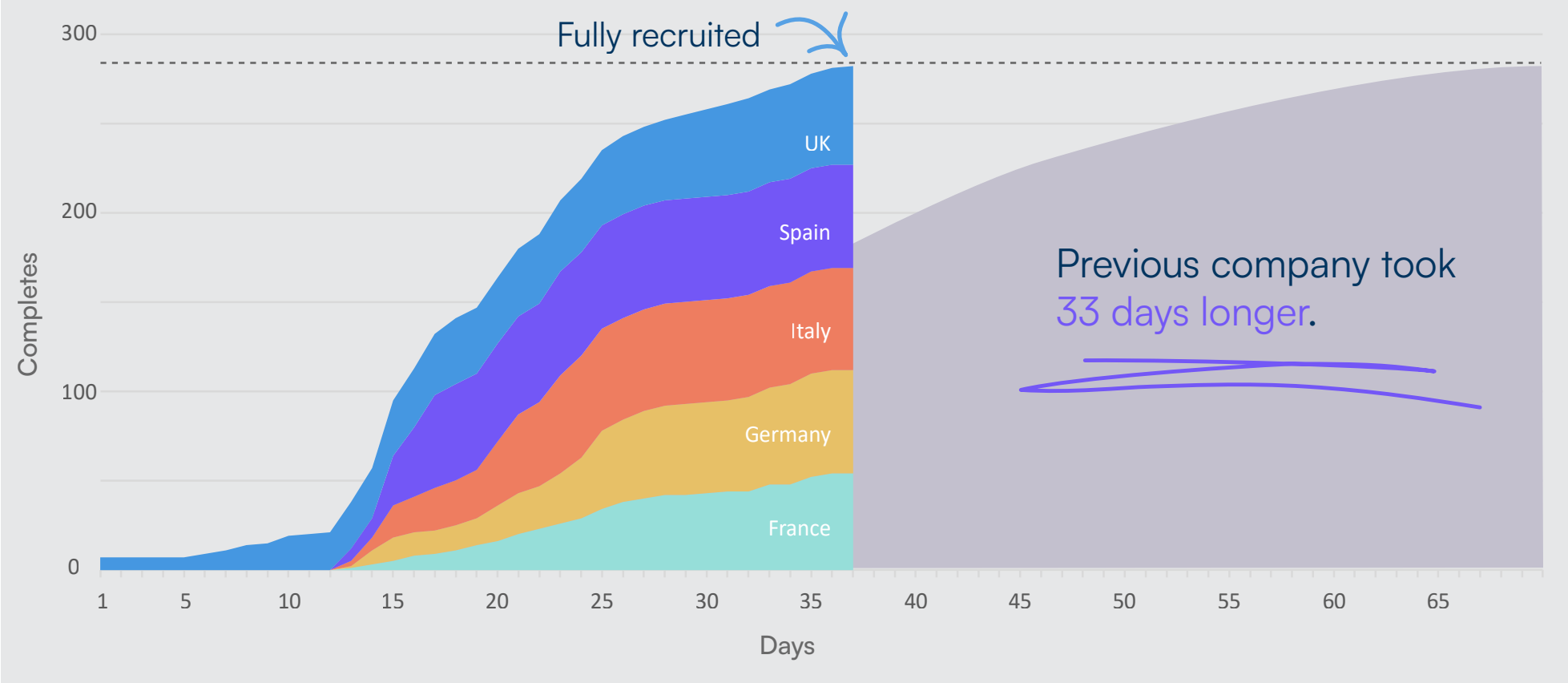
With MedSurvey’s heartbeat approach, sample partners are brought on at a rationally planned cadence to avoid project flatlines.

In the traditional, simulated approach, we assume new partners are added after two days without responses, signalling a panel has been saturated.

Applying our real world data shows that this approach would have led to 55 days in field just for this subsection of the project. By contrast, MedSurvey fully recruited this subsection in 27 days, avoiding these delays by anticipating partner performance, bringing panels on early, and exercising strong project management.

Project Result

By deploying the heartbeat approach, MedSurvey fully recruited the project well within the research company's timeframe and budget in both the U.S. and the E.U., with no surprise delays or costs. In the E.U., **where the previous sample provider had spent 70 business days (10 weeks) in field, MedSurvey delivered in only 37 days (under 6 weeks)**. As promised, MedSurvey took a little over half (53%) of the time taken by the previous sample provider, leading to a smooth and successful project.



Conclusion

Same Study, No Headaches

Because MedSurvey developed an accurate and transparent plan for managing panel partners upfront, the final price was the same as the original bid, a stark contrast with the previous vendor's 40% increase in cost.

The research company was thrilled with the outcome and will continue to partner with MedSurvey on the study going forward. Comparing her experiences with MedSurvey and the previous sample provider, the associate director said, **"It's like apples and oranges. MedSurvey went well beyond our expectations."**

	United States		EU5	
	Previous Vendor (2022)	MedSurvey (2023)	Previous Vendor (2022)	MedSurvey (2023)
Completes (Rheumatologists)	190 (Target: 200)	190 (Target: 200)	289 (Target: 250)	278 (Target: 250)
Patient Charts	1002 (Target: 1000)	1011 (Target: 1000)	1279 (Target: 1250)	1262 (Target: 1250)
Days in Field	38	36	70	37
Final Costs vs. Original Bid	28.5% Higher	As expected	40% higher	As expected



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