

Academic Research Playbook

If you're copying data between systems, relying on email chains for consent tracking, and waiting weeks to enroll your first patient—we know the feeling. You're running studies, but it often feels like you're running after them.

We're here to help. This playbook shows you what it could look like when your workflow, well, flows.

Understanding Your Flow State

Before we dive in, picture your ideal study. Timelines are met without chaos. Data flows seamlessly from sites around the world. Teams collaborate effortlessly, with no silos or bottlenecks. Friction disappears—deadlines are hit, handoffs are smooth, and the usual challenges of multi-site trials feel like a thing of the past. This is what we call a Flow State. It's that feeling of clarity, ease, and confidence that comes from knowing you're in complete control. **When you're in a Flow State, you can:**

Focus, not fight friction

Your study setup is straightforward, so you can move quickly from protocol approval to enrolling your first participant.

Build momentum, not do manual work

Data from eConsent and patient surveys flows directly into your EDC, eliminating transcription hours and reducing errors.

Get clarity, not chaos

You have a single, reliable source of truth for your data, making it easier to manage the study and prepare for analysis.

Achieving this state lets your team do its best work:

conducting important research. It creates an environment where technology supports your process instead of getting in the way.

Why It Matters Now

Having efficient processes affects more than just your teams. Every week spent on manual data entry or fighting with a clunky setup process is a week a participant waits for potential treatment.

By adopting a Flow State, you ensure:

Faster Set-Up

Meeting aggressive targets (e.g., opening recruitment within 60 days).

Higher Enrollment

Reaching diverse populations effectively.

Audit Readiness

Keeping compliance woven into the daily workflow through more consistent documentation and greater process transparency.

Your Study from Start to Finish

Imagine running your next investigator-initiated study with everything connected. **Here's what that journey could look like:**

Phase 1: Pre-Launch & Setup

You're finalizing your protocol and preparing for IRB submission. Instead of waiting until after approval to start building, you're already working in your EDC (Electronic Data Capture), creating your study forms incrementally as the protocol develops. When it's time to submit to the IRB, you generate blank CRFs and annotated casebooks directly from the system. You configure eConsent with your IRB-approved language and set up eCOA forms for patient-reported outcomes. If your study requires specialized recruitment support, you can also integrate Recruit to begin building your participant pipeline. Overall, you spend a few hours spread across protocol development—not a separate 6-week implementation phase.

Phase 2: Launch & Recruitment

Your first participant arrives and reviews eConsent on a tablet at your site (or remotely from home if your protocol allows). The moment they sign, their consent data flows automatically into your EDC and creates their participant record.

Your site coordinator opens up the EDC to complete the enrollment visit. Edit checks catch errors immediately. The participant receives an automated reminder to complete their first eCOA survey. All the data syncs to one platform.

Phase 3: Mid-Study Operations

A few weeks in, participants complete eCOA surveys on their phones. The data flows directly into your EDC with timestamps and audit trails. You check your Analytics dashboard and see enrollment progress, query rates, and data completeness.

Your site coordinator needs to pull a report for a sponsor update. Instead of emailing the data team and waiting, they generate it themselves in minutes.

If you're using EHR-to-EDC, lab values and medication histories flow directly from your site's EHR into your EDC. No manual entry. No transcription errors. Hours saved per participant.

Phase 4: Closeout

You're ready to close out the study. You export clean, SDTM-ready datasets with comprehensive audit trails. You pull comprehensive reports for IRB closeout. You generate documentation for sponsor reporting or publication supplements. Everything's documented and traceable, and there's no need to scramble to piece together compliance records.



ONE UNIFIED EDC

✓ Complete Audit Trail

✓ Inspection-Ready

✓ One Source of Truth

How The Tools Flow Together

Everything flows into your EDC. One source of truth. One audit trail. One place to see what's happening across your entire study.

What This Means for Your Research

Speed

- First patient in faster with streamlined site activation
- Shortened timeline from database lock to submission
- Study launch in days instead of weeks

Visibility

- Timely view across all sites from executive to site level
- Comprehensive audit trail from source to submission
- Identify issues early with proactive alerts

Control

- One platform instead of multiple vendor relationships
- Standardized workflows with regional flexibility
- Predictable costs with transparent pricing

The Tools Explained

EDC (Electronic Data Capture)

Your foundation. Self-service study design with drag-and-drop forms, timely validation, and comprehensive audit trails. Build and test incrementally without waiting for IT. Generate blank CRFs. Flexible study design adapts as protocols evolve. Edit checks catch errors at entry. 21 CFR Part 11, HIPAA, GDPR compliance-ready.

eConsent

Digital consent with multimedia support, comprehension checks, and secure eSignatures. Participants can review and sign remotely. Consent data flows directly into your EDC and links to each participant's record—no separate consent logs or manual tracking.

eCOA

Mobile-friendly forms with automated reminders. Participants enter data on personal or in-office devices, syncing automatically to your EDC to create one comprehensive dataset with audit trails. No more collecting paper diaries, chasing participants, or transcription errors.

Reporting & Analytics

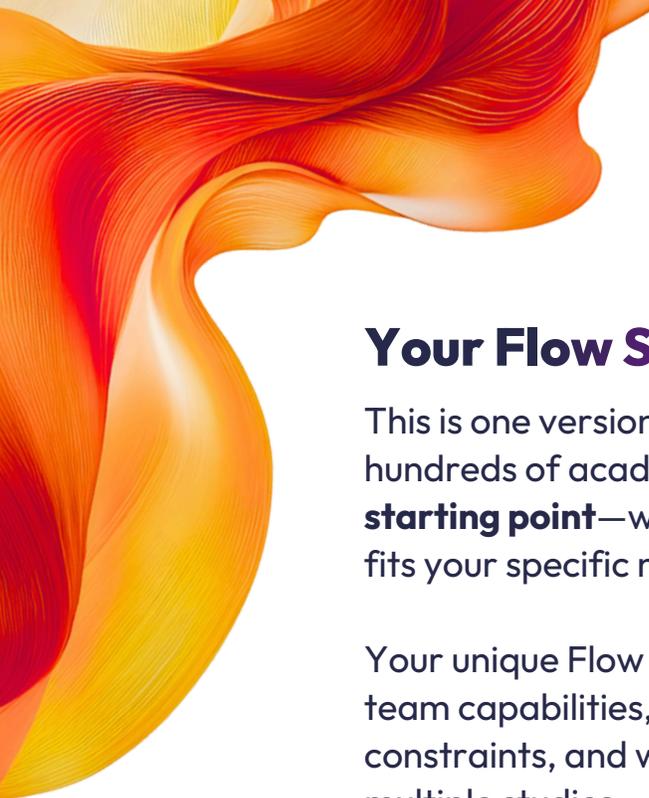
Dashboards showing enrollment, queries, data quality, and study compliance metrics on a regular basis. Aggregates data from your EDC, eConsent, and eCOA to give you the full picture in one place. Pull reports yourself without waiting for the data team.

EHR-to-EDC

Direct connection to site EHRs that automatically pulls lab values, medications, and source data. Massive time savings on data entry, streamlines source data verification, fewer transcription errors, and less burden on site staff.

Recruit

Patient recruitment services with precision targeting and pre-screening. Recruitment data flows directly into EDC, giving you visibility from first contact to enrollment. Reach hard-to-recruit or diverse populations within your budget, and reduce screen failures with smart pre-screening. Hit enrollment goals on time.



Your Flow State May Look Different

This is one version based on what we've seen work for hundreds of academic teams. **Think of it as your starting point**—we'll help you shape the version that fits your specific needs.

Your unique Flow State depends on your study design, team capabilities, IRB requirements, budget constraints, and whether you're running one pilot or multiple studies.

Some teams start with just an EDC and add eConsent later. Others begin with EDC and eCOA, then add EHR integration as they scale. The goal is finding the right fit for your situation—and for this playbook to show you what's possible.



Next Steps (When You're Ready)

Explore on your own

Check out our [Academic](#) page for more resources.

Talk to us

Want to explore what this could look like for your research program? We're here to help. [Get In Touch](#)