

Case Study

The Power of Partnership: Pivoting a Plus for Recruitment Project

Prioritizing the right strategy for long-term patient engagement proved effective vs. focusing on short-term enrollment goals

September 2026



The Challenge

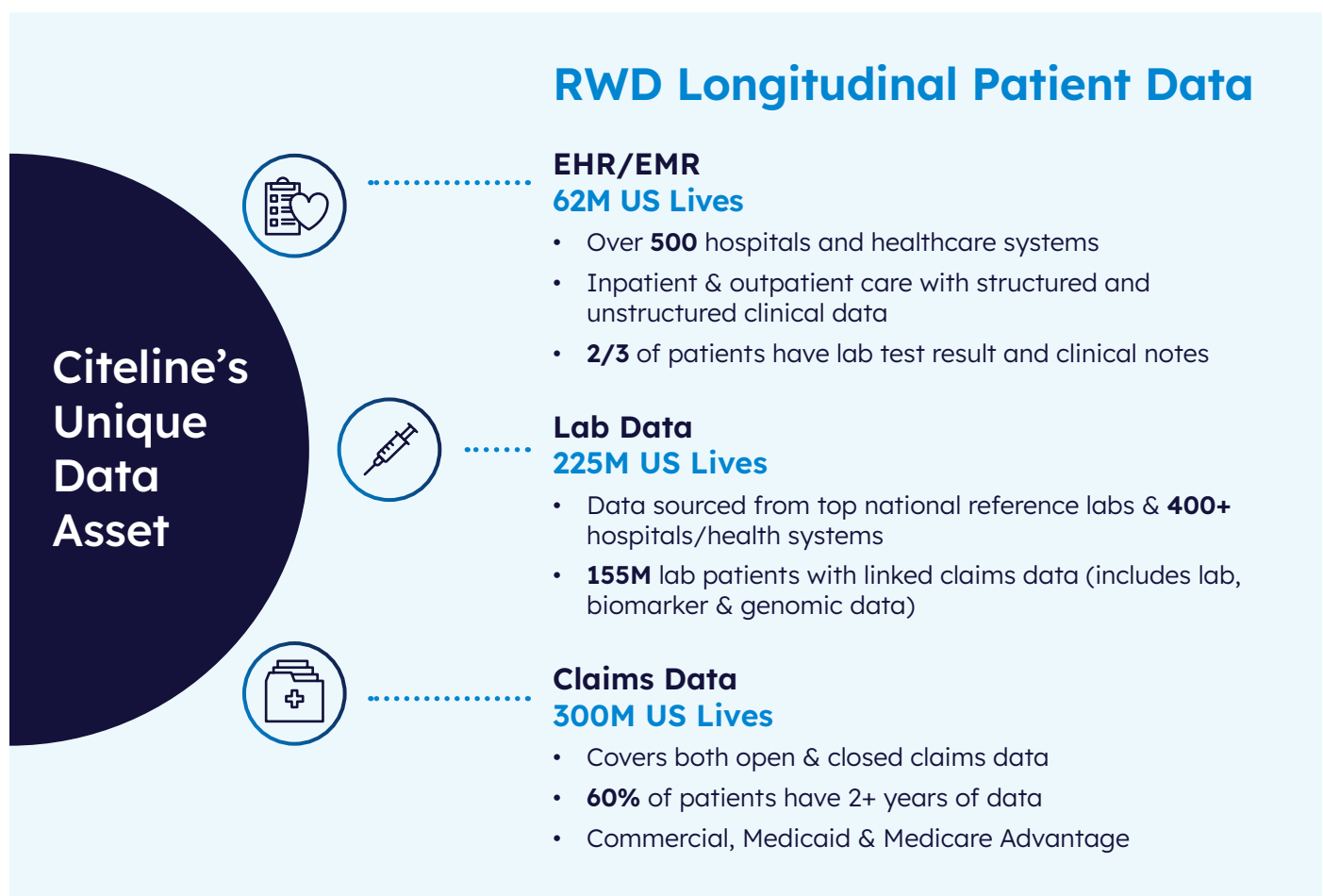
A CRO had been managing a sponsor's chronic lymphocytic leukemia (CLL) study in Europe for about a year and was asked to take over the US side because enrollment was very slow there. That's when the CRO enlisted Citeline to help identify sites and patients.

The Approach

First, Citeline identified potential new sites, providing a heatmap of the patient population showing the incidence of potentially eligible patients across the US. This helped the CRO narrow where to conduct its search.

To home in on patients, the Citeline team created an algorithm using its **Citeline PatientMatch** solution to specifically search for the protocol-matched patient population and send targeted alerts to principal investigators and treating physicians clinically tied to these patients. The CRO relied on this for the duration of the 12-month campaign.

The algorithm draws from Citeline's robust repository of real-world data (RWD):



The Power of Partnership: Pivoting a Plus for Recruitment Project

Mixed Results

While the algorithm yielded thousands and thousands of patients, it did not produce actual enrollments, due to multiple factors:



The trial had incredibly complex inclusion/exclusion (I/E) criteria, coupled with strict lab result criteria.



The sponsor revised the criteria used to find patients twice, making it even more specific to the particular study.



Restrictions on what personal information could be disclosed limited the ability of physicians to identify specific patients.



A significant percentage of the patients identified were matched to their diagnosing physician; in oncology this is typically a pathologist who has never met the patient.

Course-correcting

Toward the end of the campaign, Citeline offered the CRO a newly available service: direct-to-patient (DTP) outreach. In collaboration with Quest Diagnostics, Citeline developed an algorithm to identify Quest patients. This enabled Quest to contact eligible individuals directly about the study, successfully driving increased engagement. Through Quest's targeted recruitment approach, they achieved a 200% increase in patient registrations at the study site.

The CRO was impressed by Citeline's ability to whittle down a list of over 4,000 patients and Quest's ability to conduct targeted outreach, minimizing the burden placed on sites.

Overall, the CRO viewed this campaign as a success in terms of patient engagement.



200%

increase in patients registered at the site



2,936

patients who opened the email



115

eligible patients who visited the study page



4,000+

patients identified

The Power of Partnership: Pivoting a Plus for Recruitment Project

Future Implications

In the wake of this campaign, the logic behind Citeline's algorithm has been optimized for precision. Citeline PatientMatch is still running the patient information — including the year of birth, gender, race, and date of physician visit — against the I/E criteria but only pulling up the information most relevant to the visit. This patient information is now coming mostly from electronic health records (EHR), not solely from claims, providing more accuracy.

Physicians are encouraged to look at plus or minus one day in their schedulers in case the given patient visit date does not initially appear. In addition, Citeline is filtering for specialties to overcome the roadblock often hit with pathologists who have no direct connection to the patient.

The Citeline team incorporates learnings from this and each of its projects to further enhance the output of Citeline PatientMatch, benefiting all clients.

“

”

I'd like to highlight the willingness of the Citeline team to be flexible...
The experience of working with Citeline was very positive.

Matyas Petho
Country Operations Manager, CRO

Discover how
Citeline PatientMatch
can pinpoint patients
for your trial.

[LEARN MORE](#)





Citeline, backed by the strength of [Norstella](#) — the AI company for biopharma’s highest-stakes decisions — powers a full suite of complementary business intelligence offerings to meet the evolving needs of life science professionals to accelerate the connection of treatments to patients and patients to treatments. These patient-focused solutions and services deliver and analyze data used to drive clinical, commercial, and regulatory-related decisions and create real-world opportunities for growth.

Citeline’s global teams of analysts, journalists, and consultants keep their fingers on the pulse of the pharmaceutical, biomedical, and medtech industries, covering them all with expert insights: key diseases, clinical trials, drug R&D and approvals, market forecasts, and more. For more information on one of the world’s most trusted health science partners, visit [Citeline](#) and follow on [LinkedIn](#) and [X](#).