



CRO
LEADERSHIP
AWARDS 2018

SELECTING CROs

**AN EXCERPT
FROM THE
2018 CRO
LEADERSHIP
AWARDS ISSUE**

Life Science
Leader

ISR *reports*

Smarter questions • Smarter answers

CRO Selection Taken Seriously

REBECCA MCAVOY VP of Market Research, Industry Standard Research

Industry Standard Research (ISR) asked over 500 clinical-development outsourcers their level of agreement with the statement: “My organization’s mix of CROs is not likely to change much in the next two years.” Sixty-five percent of these respondents at least slightly agreed with this statement. The remaining 35 percent at least slightly disagreed with the statement, meaning they anticipate some level of change to their organization’s mix of CROs over the next few years. Thirty-five percent might not seem like a high percentage, but if I were responsible for business development at a CRO and you told me that one-third of my accounts were considering changing their mix of CROs, you can bet I’d be nervous. I also may view this opportunistically, as this stat likewise means that one-third of my competitors’ accounts may be up for grabs as well.

With the potential for churn in sponsors’ current mix of providers, sponsors will need to put in the legwork to choose appropriate CROs. Selecting or even creating a shortlist of providers without sufficient information is risky, considering the importance of properly and efficiently executing clinical trials. From the service provider’s perspective, CROs need to put their best foot forward during the proposal and bid-selection processes. Therein lies the rub. How do sponsors choose the CRO that best fits their needs? And how do CROs know what is important to the sponsors whose business they’re hoping to win?

Via an online survey, we collected information from clinical-development outsourcers regarding their selection and evaluation of CROs. Respondents share the key attributes they consider when selecting a CRO and then rate, along the same dimensions, the performance of providers with which they have recently worked. Understanding selection-driver data alongside provider performance ratings allows service buyers to gain a comprehensive view of how providers fare on key attributes. No longer do decision makers have to rely on casual conversation with the colleague down the hall to enlighten them

on what it’s like to work with a new provider. These structured and detailed performance evaluations go a long way in helping sponsors understand the highlights and/or pitfalls that others have encountered in their experience with a provider.

So what is important to sponsors when looking to outsource clinical development work? Figure 1 shares the top selection criteria for three real-life decision-making scenarios when outsourcing Phase 2/3 services: 1) choosing a provider from a preferred provider list, 2) choosing a provider that is not on the preferred provider list, and 3) choosing a provider in the absence of a preferred list.

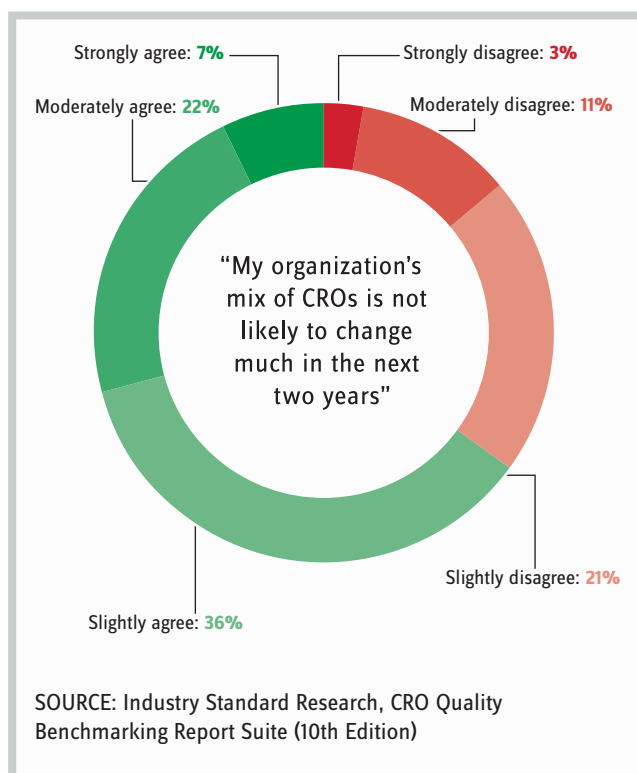


Figure 1

Choosing among preferred providers	Choosing a provider NOT on the preferred list	No preferred provider list
Operational excellence	Operational excellence	Operational excellence
Prior positive experience with service provider	Therapeutic expertise	Therapeutic expertise
Therapeutic expertise	Low cost	Prior positive experience with service provider
Expectations for data quality	Experience with similar study types	Experience with similar study types
Patient recruitment strategy	Offers innovative solutions	Project manager quality

Notice any themes? We sure do. *Operational excellence* and *Therapeutic expertise* appear in each of the decision-making scenarios, something that has happened three years running. The takeaway is this: These two attributes aren't going anywhere, anytime soon. CROs will be judged on their ability to operate well and on their expertise in the desired therapeutic areas. *Prior positive experience with service provider* and *experience with similar study types* are among the top attributes for two of the scenarios. Sponsors want to feel certain that providers know their stuff.

“With the potential for churn in sponsors' current mix of providers, sponsors will need to put in the legwork to choose appropriate CROs.”

A host of other traits appears among the top attributes and varies by scenario. Knowing what is important regardless of decision-making scenario is critical, but the ability to discern how key attributes differ among scenarios is similarly important.

ISR also asked 300 respondents how they believe Phase 2/3 service provider performance has changed

over the past few years. About half said it has remained the same, 25 percent felt it has improved, and 21 percent felt provider performance has declined. That 21 percent is a pretty substantial proportion of people who feel that CROs are generally not performing as well as they used to. If these outsourcers are considering a change in their service providers, they'll likely feel confident selecting a new provider if they can use experience-based data to understand, in detail, how the provider has performed for industry peers. For CROs, understanding how your performance is viewed through the eyes of your customers will help you address any potential weaknesses and manage to your strengths. **L**

Survey Methodology: Industry Standard Research is a full-service market research provider to the pharma and pharma services industries. ISR's CRO Quality Benchmarking research is conducted annually via an online survey. For the 2018 CRO Awards data, more than 60 services providers were evaluated on over 20 different performance metrics. Research participants were recruited from biopharmaceutical and medical device companies of all sizes and are screened for decision-making influence and authority when it comes to working with CROs. **Respondents evaluate only companies with which they have worked on an outsourced project within the past 18 months.** This level of qualification ensures that quality ratings come from actual involvement with a business and that companies identified as leaders are backed by experiential data.



CRO LEADERSHIP AWARDS 2018

Life Science Leader's readership of pharmaceutical and biopharmaceutical executives has told us about their struggles in efficiently vetting potential CRO partners. In response to this input, *Life Science Leader* developed the CRO Leadership Awards.

Based on research from Industry Standard Research's *Contract Research Organization Quality Benchmarking* annual online survey, 70 contract research organizations were evaluated on more than 20 different performance metrics. Research participants were recruited from biopharmaceutical companies of all sizes and were screened for decision-making influence and authority when it comes to working with contract research organizations. Respondents evaluate only companies with which they have worked on an outsourced project within the past 18 months. This level of qualification ensures that quality ratings come from actual involvement with a business and that companies identified as leaders are backed by experiential data. CROs have an opportunity to win these awards in up to three groups of outsourcing respondents – Big Pharma, Small Pharma, and Overall (combined Big and Small Pharma).

WHAT ARE THE AWARDS?

ISR survey participants were asked to provide an expectation rating for each CRO they have worked with in the past 18 months. Points were then totaled for a combined score for each attribute, and a composite score for each core category was determined. Winning CROs were determined when comparing their overall score vs. the competitive set.

To learn more about ISR's industry reports and customized research, or to be included in future CRO Quality Benchmarking annual surveys, visit isrreports.com or contact ISR at info@isrreports.com.

PRESENTED BY:

Life Science
Leader

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ISR
reports

Smarter questions • Smarter answers

CRO LEADERSHIP AWARDS 2018 CAPABILITIES

- ▶ Access to unique tests, machines, equipment
- ▶ Access to a broad range of services beyond clinic / volunteer management
- ▶ Access to patient populations
- ▶ Offered innovative solutions
- ▶ Patient / volunteer recruitment
- ▶ Speed of site startup
- ▶ Technology for real-time access to data
- ▶ Breadth of services
- ▶ Global footprint
- ▶ Network of sites / investigators
- ▶ Patient recruitment strategy
- ▶ Speed of site / investigator recruitment

CAPABILITIES

TOP PERFORMERS

OVERALL

SGS
bioskin GmbH
Biotrial
Bioclinica
Worldwide Clinical Trials
NAMSA
Celerion

BIG PHARMA

SGS
Bioclinica
NAMSA
Medpace
Duke Clinical Research Institute

SMALL PHARMA

Worldwide Clinical Trials
Celerion

EXCEEDED CUSTOMER EXPECTATIONS

OVERALL

Rho
WCCT Global
Syneos Health
Medpace
Premier Research
Duke Clinical Research Institute
BioPharma Services Inc.
PPD
Centre for Human Drug Research (CHDR)
Frontage Laboratories
Eurotrials Scientific Consultants
Quotient Clinical
Eurofins Scientific
PAREXEL International

BIG PHARMA

Celerion
Syneos Health
Quotient Clinical
PPD
IQVIA

SMALL PHARMA

SGS
Rho
Chiltern, a Covance Company
Bioclinica
Syneos Health
WCCT Global
Frontage Laboratories
PAREXEL International
PPD
Eurofins Scientific
Medpace

MET CUSTOMER EXPECTATIONS

OVERALL

Chiltern, a Covance Company
Novotech
IQVIA
Covance
PSI CRO

BIG PHARMA

Covance
Worldwide Clinical Trials

SMALL PHARMA

Quotient Clinical
Nuvisan
Novotech

Companies are listed in ranking order per survey results.
The terms "Small Pharma" and "Big Pharma" pertain to the outsourcing respondents, not the winners. "Overall" is a combination of Big and Small Pharma.

CRO LEADERSHIP AWARDS 2018 COMPATIBILITY

- ▶ Easy to work with
- ▶ Project team chemistry
- ▶ Responsiveness
- ▶ Timely project communications

COMPATIBILITY

TOP PERFORMERS

OVERALL

NAMSA
Biotrial
PSI CRO
SGS
Nuvisan
Quotient Clinical
Eurotrials Scientific Consultants
Premier Research
BioPharma Services Inc.
Celerion
Medpace
Worldwide Clinical Trials
Bioclinica

BIG PHARMA

SGS
NAMSA
Bioclinica

SMALL PHARMA

Quotient Clinical
Nuvisan

EXCEEDED CUSTOMER EXPECTATIONS

OVERALL

Syneos Health
Rho
WCCT Global
Frontage Laboratories
Novotech
Duke Clinical Research Institute
Eurofins Scientific

BIG PHARMA

Celerion
Medpace
Duke Clinical Research Institute
Syneos Health
Tata Consultancy Services
Frontage Laboratories
CRS Clinical Research Services
Andernach GmbH

SMALL PHARMA

Worldwide Clinical Trials
Celerion
Medpace
WCCT Global
Frontage Laboratories
Syneos Health
SGS
Bioclinica
Rho
Chiltern, a Covance Company
Eurofins Scientific
Novotech
PAREXEL International
Duke Clinical Research Institute

MET CUSTOMER EXPECTATIONS

OVERALL

bioskin GmbH
CRS Clinical Research Services
Andernach GmbH
ICON
PAREXEL International
Tata Consultancy Services
PPD
Covance
IQVIA
DaVita Clinical Research

BIG PHARMA

PPD
IQVIA
Quotient Clinical
Covance
ICON
QPS

SMALL PHARMA

ICON
Premier Research
DaVita Clinical Research
Covance
PPD
PRA Health Sciences

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CRO

LEADERSHIP AWARDS 2018

EXPERTISE

- ▶ Experience of the Phase I unit's lead investigator
- ▶ Local market / regulatory knowledge
- ▶ Operational excellence
- ▶ Scientific knowledge
- ▶ Therapeutic experience
- ▶ Study design expertise

EXPERTISE

TOP PERFORMERS

OVERALL

NAMSA
Biotrial
SGS
Duke Clinical Research Institute
bioskin GmbH
Celerion
Medpace
Worldwide Clinical Trials
Quotient Clinical

BIG PHARMA

NAMSA
SGS
Duke Clinical Research Institute
Bioclinica

SMALL PHARMA

Quotient Clinical
SGS

EXCEEDED CUSTOMER EXPECTATIONS

OVERALL

Premier Research
Rho
Bioclinica
BioPharma Services Inc.
PSI CRO
DaVita Clinical Research
Syneos Health
Novotech

BIG PHARMA

Celerion
Medpace
IQVIA
Syneos Health
QPS
Worldwide Clinical Trials

SMALL PHARMA

Duke Clinical Research Institute
Worldwide Clinical Trials
Medpace
Celerion
PAREXEL International
Rho
Syneos Health
Chiltern, a Covance Company
DaVita Clinical Research
Frontage Laboratories
Novotech

MET CUSTOMER EXPECTATIONS

OVERALL

IQVIA
PAREXEL International
Frontage Laboratories
WCCT Global
Nuvisan
Eurofins Scientific
PPD
Covance
Lambda
Tata Consultancy Services
PRC Clinical
Centre for Human Drug Research (CHDR)
ICON
Chiltern, a Covance Company
Eurotrials Scientific Consultants

BIG PHARMA

PPD
Quotient Clinical
Tata
Frontage Laboratories
Covance

SMALL PHARMA

Eurofins Scientific
Nuvisan
ICON
Bioclinica
Covance
WCCT Global
PPD
IQVIA
PRA Health Sciences

CRO LEADERSHIP AWARDS 2018 QUALITY

- ▶ Data quality
- ▶ Project manager quality
- ▶ CRA quality

QUALITY

TOP PERFORMERS

OVERALL

NAMSA
bioskin GmbH
SGS
Biotrial
Eurotrials Scientific Consultants
Bioclinica
Quotient Clinical
Worldwide Clinical Trials
Celerion

BIG PHARMA

SGS
NAMSA
Bioclinica
Celerion
Duke Clinical Research Institute

SMALL PHARMA

Frontage Laboratories

EXCEEDED CUSTOMER EXPECTATIONS

OVERALL

PSI CRO
Duke Clinical Research Institute
Syneos Health
Frontage Laboratories
Nuvisan
Novotech
Rho
Medpace
Premier Research
Tata
Centre for Human Drug Research (CHDR)
Eurofins Scientific
PAREXEL International

BIG PHARMA

Quotient Clinical
Medpace
Syneos Health
Tata Consultancy Services
IQVIA
Frontage Laboratories

SMALL PHARMA

Chiltern, a Covance Company
SGS
Worldwide Clinical Trials
Quotient Clinical
Bioclinica
Syneos Health
Nuvisan
PAREXEL International
Novotech
Rho
Eurofins Scientific
Celerion
Medpace
Duke Clinical Research Institute

MET CUSTOMER EXPECTATIONS

OVERALL

ICON
BioPharma Services Inc.
IQVIA
PPD
Covance
Chiltern, a Covance Company

BIG PHARMA

ICON
Worldwide Clinical Trials
Covance
PPD
CRS Clinical Research Services
Andernach GmbH

SMALL PHARMA

ICON
PPD
Covance
WCCT Global

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CRO

LEADERSHIP AWARDS 2018

RELIABILITY

- ▶ Meeting overall project timelines
- ▶ Operational excellence
- ▶ Minimizing staff turnover

RELIABILITY

TOP PERFORMERS

OVERALL

NAMSA
Biotrial
SGS
Celerion
Worldwide Clinical Trials
bioskin GmbH
Quotient Clinical
Premier Research
Bioclinica
BioPharma Services Inc.
Duke Clinical Research Institute
Medpace
PSI CRO

BIG PHARMA

SGS
NAMSA
Duke Clinical Research Institute
Bioclinica
Celerion

SMALL PHARMA

Quotient Clinical
Worldwide Clinical Trials
Celerion
SGS
Frontage Laboratories

EXCEEDED CUSTOMER EXPECTATIONS

OVERALL

Frontage Laboratories
Nuvisan
Syneos Health
WCCT Global
Tata Consultancy Services
Eurotrials Scientific Consultants
Eurofins Scientific
Rho

BIG PHARMA

Medpace
Quotient Clinical
Tata Consultancy Services
Frontage Laboratories
Syneos Health
Worldwide Clinical Trials
PPD

SMALL PHARMA

Bioclinica
Medpace
Nuvisan
Eurofins Scientific
Syneos Health
WCCT Global
PAREXEL International
Duke Clinical Research Institute
Rho
Chiltern, a Covance Company



CRO LEADERSHIP AWARDS

INDIVIDUAL ATTRIBUTE AWARDS

The Individual Attribute Awards were developed as a result of many conversations we have had with the readers of *Life Science Leader*. These conversations uncovered common attributes that sponsor companies identified as being imperative when choosing a supplier and deciding to continue doing business with a supplier.

They were often referred to as the ever-important “intangibles” a supplier brings to the table. Outside of the cover metrics of capabilities, compatibility, development, expertise, phase IV, quality, and reliability, these attributes were what our readers identified as being the most important, and as such, we felt it was important to share the data with other sponsor companies.

DATA QUALITY

TOP PERFORMERS

bioskin GmbH
NAMSA
Biotrial
SGS
Bioclinica
Eurotrials Scientific Consultants
Celerion

EXCEEDED CUSTOMER EXPECTATIONS

Syneos Health
Worldwide Clinical Trials
Medpace
Rho
Novotech
Frontage Laboratories
Tata Consultancy Services
WCCT Global
PAREXEL International
Duke Clinical Research Institute
Quotient Clinical
Nuvisan

MEETING PROJECT TIMELINES

TOP PERFORMERS

Biotrial
SGS
Quotient Clinical
NAMSA
Eurotrials Scientific Consultants
Celerion
Worldwide Clinical Trials
Nuvisan
Tata Consultancy Services
bioskin GmbH
Premier Research
BioPharma Services Inc.
Frontage Laboratories

EXCEEDED CUSTOMER EXPECTATIONS

Duke Clinical Research Institute
Bioclinica
PSI CRO
Medpace
Syneos Health
Centre for Human Drug Research (CHDR)
Eurofins Scientific
Novotech

OPERATIONAL EXCELLENCE

TOP PERFORMERS

SGS
NAMSA
Celerion
bioskin GmbH
Biotrial
Premier Research
Medpace
Quotient Clinical
Worldwide Clinical Trials

EXCEEDED CUSTOMER EXPECTATIONS

Bioclinica
Duke Clinical Research Institute
Syneos Health
BioPharma Services Inc.
Frontage Laboratories
PSI CRO
Nuvisan
Rho
WCCT Global

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CRO LEADERSHIP AWARDS

INDIVIDUAL ATTRIBUTE AWARDS

RESPONSIVENESS

TOP PERFORMERS

NAMSA
Eurotrials Scientific Consultants
SGS
Biotrial
PSI CRO
Premier Research
Nuvisan
Quotient Clinical
Medpace
Celerion
Worldwide Clinical Trials
Bioclinica

EXCEEDED CUSTOMER EXPECTATIONS

Duke Clinical Research Institute
Frontage Laboratories
Syneos Health
WCCT Global
Rho
Novotech
DaVita Clinical Research
CRS Clinical Research Services Andernach GmbH
BioPharma Services Inc.

TECHNOLOGY FOR ACCESS TO DATA

TOP PERFORMERS

SGS
bioskin GmbH
Clinipace Worldwide
Biotrial
NAMSA
Cognizant

EXCEEDED CUSTOMER EXPECTATIONS

Centre for Human Drug Research (CHDR)
Celerion
Bioclinica
Rho
Syneos Health
Tata Consultancy Services
WCCT Global
PAREXEL International
Worldwide Clinical Trials
Lambda
IQVIA
Covance

KEY



CAPABILITIES



COMPATIBILITY



EXPERTISE



QUALITY



RELIABILITY

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WORLDWIDE
CLINICAL TRIALSCATEGORIES WON:     

Worldwide Clinical Trials

Morrisville, NC
www.worldwide.comPhone: 610-964-2000
Contact: Lynn Ledwith
Email: lynn.ledwith@worldwide.com
KEY LOCATIONS: North America,
South America, Europe, Russia, Asia

DRUG LIFE CYCLE STAGES:

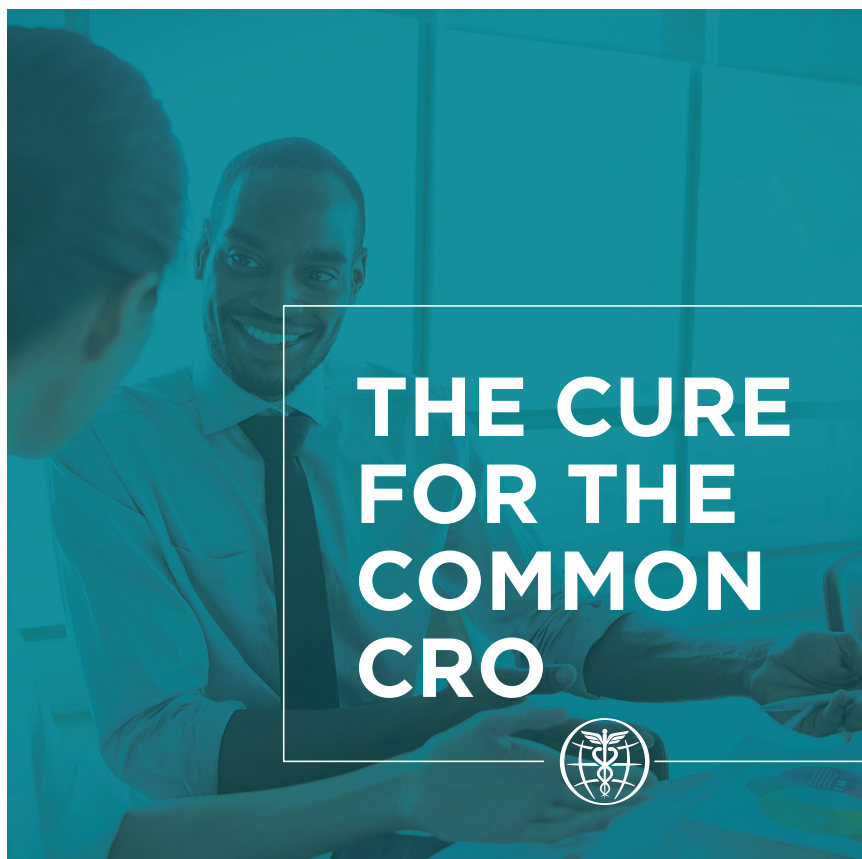
Research & Development:
Clinical, Phase 1, Phase 2, Phase 3

MAIN SERVICE AREAS:

Full Service Clinical

SERVICES & CAPABILITIES: Worldwide delivers full-service contract research services, extending from bioanalytical labs, early phase 1-2A, clinical phase 2B-3, phase 3B-4, through real-world evidence studies.**THERAPEUTIC AREAS:** We help sponsors move from discovery to clinical development and commercialization across a range of therapeutic areas, including central nervous system, cardiovascular & metabolic, immune-mediated inflammatory disorders, oncology, and rare diseases.**INDIVIDUAL ATTRIBUTE AWARDS:** Data Quality, Meeting Overall Project Timelines, Technology For Access To Data, Operational Excellence, Responsiveness**PETER BENTON**
President & Chief
Operating Officer

"Recognition in the CRO Leadership Awards is a reflection of the commitment and expertise of the 1,600 Worldwide professionals who deliver uncommon value to our customers every day. Emerging to mid-size pharmaceutical/biopharmaceutical organizations are realizing that large CRO consolidation is detrimental to their goals and the respect they deserve from a CRO partner. Their desire to partner with a CRO whose approach is to tailor research for their specific drug and situation is fueling our rapid growth and expansion."



We are honored to be recognized by our customers for excellence in CRO Capabilities, Compatibility, Expertise, Quality, and Reliability

It's hard to put a finger on what, exactly, makes Worldwide different from other CROs — but you start to get it when you experience the passion, expertise, and commitment in every team member. We put everything into our projects.

Our dogged determination to get it right. Our spirit of invention. Our rigorous processes. Always curious. Always dedicated to delivering quality data.

It keeps our customers coming back, choosing Worldwide as their partner time after time. From bioanalytical lab services to early phase, late phase, and real-world evidence studies, we're out to change how the world experiences CROs — in the best possible way.

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FULL-SERVICE, AWARD-WINNING CRO SERVICES

Bioanalytical Services | Phase I-IIa | Phase IIb-III
Phase IIIb-IV | Real-World Evidence | Rater Services

THERAPEUTIC FOCUS AND EXPERTISE

Central Nervous System | Cardiovascular and Metabolic
Immune-Mediated Inflammatory Disorders
Oncology | Rare DiseasesWORLDWIDE
CLINICAL TRIALS