



SCHOOL OF MEDICINE

North Carolina Translational and Clinical Sciences Institute

# SELLING YOUR STUDY

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Defining value and cultivating buy-in

Emily Olsson, CCRP

Program Manager



# OVERVIEW

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- The perception of value on the part of the study team might be different from how the participant defines value.
- It's important to critically evaluate your protocol against your customer profile and use those findings to inform your recruitment and retention tactics.
- Recruitment and retention efforts will benefit from highlighting/reinforcing that value in messaging and interaction.
- Make every point of contact personal, utilize empathy and active listening to continue to inform and refine the value proposition.

# WHAT DO WE MEAN BY SELLING YOUR STUDY?

Participant-centric  
and engaged

Purposeful  
consideration of  
information  
framing

Meeting people  
where they are

An informed and  
skilled recruiter

Awareness,  
flexibility,  
persistence,  
responsiveness

Tailored rather  
than one-size-fits-  
all

At its core, recruitment is sales.

You have a product (the study) and you need your customer (the participant) to buy it (enroll).

It's your job to introduce the product in a way that conveys value to the participant and encourages them to choose to take time out of their day/life to participate.

# YOU THOUGHT YOU WERE A RESEARCHER...

...and you are! But let's look at some of your daily responsibilities:

- Identifying your potential participants
- Selecting recruitment strategies
- Developing recruitment materials and campaigns
  
- Fielding inquiries from potential participants
- Approaching patients in clinic
- Pitching your study
- Informed consent and answering questions
  
- Managing expectations
- Keeping participant invested and engaged
- Ensuring compliance and quality data



Marketing



Sales



Customer  
Service

# WHY IS VALUE IMPORTANT?

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- You get one shot and no more than 30 seconds at an intro; If you don't frame info for them in a way that is relevant, they'll do it themselves
- Leading the participant from interest to investment, their priorities should drive framing and content
- Must speak to what the participant sees as important - you're asking them to do something extra which may or may not directly benefit them
- Be aware of pains and know where they come from, respectfulness and awareness of participant's competing needs and priorities further help to build trust and provide a more positive and receptive foundation
- Always circle back to the value as a tactic for managing frustration or annoyance
- An effective value proposition improves customer understanding and engagement, leading to more meaningful buy-in, leading to improved recruitment and retention rates. The study team must be creative and determine what resonates with their target audience(s)
- Particularly important with oversaturated populations, underserved populations, and those who are research naïve

# COMMUNICATION SCIENCE

Deciding to be part of a clinical trial is a progression and the messages can be mapped to this progression.

## 1. Precontemplation

- Has never heard of a clinical trial
- Is not interested in participating

## 2. Contemplation

- Knows some about clinical research
- Is willing to learn more to consider participation

## 3. Preparation

- Made an appointment with researchers
- Is asking questions about participating

## 4. Action

- Has been pre-screened by PCP and PI
- Has read consent form

## 5. Maintenance

- Has signed consent form
- Is not a screen failure
- Has come to baseline appointment

These are the five phases of decision making in the transtheoretical model.

Clark, Luther T, et al. "[Increasing Diversity in Clinical Trials: Overcoming Critical Barriers](https://doi.org/10.1016/j.cpcardiol.2018.11.002)". Current Problems in Cardiology, Volume 44, Issue 5, 2019, Pages 148-172, ISSN 0146-2806. <https://doi.org/10.1016/j.cpcardiol.2018.11.002>.

# EMOTIONS OF CHANGE

## Lead to Resistance

**Anxiety**

**Confusion**

**Frustration**

**Fatigue**

## Lead to Resilience

**Purpose**

**Enthusiasm**

**Optimism**

**Confidence**

Source: McKinsey Quarterly  
© 2013 Discovery Learning, Inc.

# PERSONAL EXPERIENCE

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- Various disciplines support this, but so does common sense
- Think about your own experiences with sales or requested behavior change.
  - What were the characteristics of a good experience?
  - What were the characteristics of a bad experience?



# SALES SKILLS ARE JUST AS IMPORTANT AS THE REST

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- Genuinely connect with a variety of people
- Genuinely passionate about your product and the process
- Read the customer quickly and adjust information and approach accordingly
- Frame information in a way that matters to THEM
- Imagination and creativity
- Remain curious and adaptable
- Meet the customer where they are in the process
- Listen and ability to communicate clearly and succinctly
- Honest about inconveniences but always routes back to value and buy-in
- Has conviction and confidence in the product and its importance, but is not pushy
- Allows the customer to process information and come to their own decision
- Patience, Persistence, and Resiliency

# INTRODUCING RESEARCH

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- Lead the person through engagement – each material and conversation is a piece of the whole
  - Research as concept, study recruitment material, cold pitch, screening conversation, IC, study relationship/retention
  - Digestible chunks of information; consider your language
- You are not dumbing it down for them, you are thoughtfully introducing information in a way that allows them to process the purpose, get excited about the opportunity, and really hear what you are asking.
- Recruitment is more successful when participants don't feel a baseline pressure. Although you want to engage potential participants in dialog to motivate their interest in a study, do not focus exclusively on the study and your recruitment numbers. Instead, focus on the potential participant and communicate in ways and at the pace that each potential participant seems comfortable.

# INTRODUCING RESEARCH

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- You need to frame your message for your audience
- One, clear take-home message
- Meet the person where they are
- Set aside your assumptions and consider the perspective of the audience
  - What segments of your audience might respond to different elements or framing?

# A DIFFERENT LENS

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- Customer Discovery - cultivate a skillset to challenge your assumptions about your idea and your customer. *Be a detective.* Learn from the people you want to help:
  - Listen to learn how they describe their behavior and motivations
  - Observe how they actually behave and respond
  - Try out some different approaches and see who responds to what
- The Value Proposition Canvas - a tool to help you critically evaluate your protocol (product) and your participant profile (customer) to *inform study design and sales approaches.*
  - Identify how your study aligns (or not) with participant priorities.
  - Clarify the priorities you are addressing – highlight these
  - Discover the priorities you are not addressing – incorporate these

# CUSTOMER DISCOVERY

# WHO IS YOUR CUSTOMER?

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- The first thing you need to figure out is who your customer(s) is(are)
- What motivates them? What are they concerned about? What is important to them? What are their obligations and priorities?
- Consider health, cultural, and historical impacts on perception
- Consider context

# WHO IS YOUR CUSTOMER?

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- Generally, your inclusion/exclusion criteria will guide the definition of your segments
- You may need to consider that sub-segments will need to be targeted for recruitment as the study progresses.
- There will be certain elements of your study that are not negotiable, so your job is to learn how your customer perceives research, their situation in relation to the research, what they fear, and what they prioritize as valuable.

# CUSTOMER DISCOVERY

## What it is

- Detective work
- Listening
- Looking for patterns
- Get out of your bubble
- Challenge your assumptions
- Who do you want to learn from?
- What do you want to learn?

## What it is not

- Asking people to design the product for you
- Compiling statistically significant answers
- Giving up on your vision
- Sales



# CUSTOMER DISCOVERY

## When is it useful?

- From idea inception through participant retention
- Customer segments can be organized according to shared characteristics: healthy volunteer vs. condition, by demographic characteristics

## Why is it important?

- Creating archetypes of customer segments allows you to create a profile of their motivations and values
- Learning by listening and observing
- Your customer drives the value – to get them to buy-in, you have to understand what they do, want, and need.

# TECHNIQUES

- Walk in their shoes to gain empathy and personal understanding
- Observe their to see honest behavior
- Talk to people to get intel on behavior and motivation
  
- Focus groups, stakeholder engagement, individual discussions
- Do some research, if you were this person, where would you start and what would get your attention
- Compare response rates to various messages or campaigns – see if what people say motivates them is actually what they are engaging with
  
- Ask open ended questions
- Encourage storytelling
- Challenge your assumptions
- Challenge the assumptions of the customer

# MOTIVATIONS OF YOUR PARTICIPANT

## Perceived motivations

- Altruism
- Advancing science
- No other treatment option
  
- I can make a difference for others
- This can make a difference for me

## Actual motivations

- Time commitment
- Travel
- Convenience
- Benefits
- Relevance
  
- What's in it for me?
- I'm busy, why should I make the effort to do this?

# VALUE PROPOSITION CANVAS

# THE BASICS

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- A. What you have: a product (the study) created with the intention of addressing a problem or meeting a need for a segment of the population.
- B. What you need: customers (potential participants) to buy your product by expressing interest, enrolling, and remaining invested.
- C. How to get from A to B: Use the value proposition canvas to define the needs of your customer, the characteristics of your product, prioritize the relevance of each element, and define the core messages that are likely to resonate with your audience.

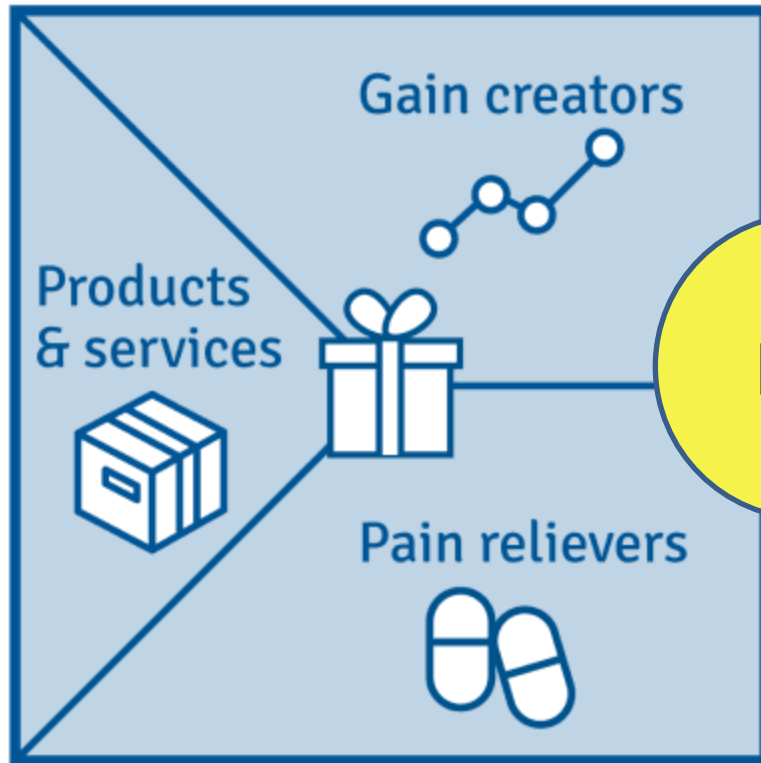
# THE DOMINO EFFECT OF SUCCESSFUL ENGAGEMENT

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- When you match your product to your customer, you validate and enhance the participant experience
- Use these insights to move the customer seamlessly through the process and keep them excited. Defining appropriate value starts a domino effect of successful engagement and accrual.
- By creating recruitment materials that start with the participant, it's easier to generate interest, pique curiosity, garner buy-in, maintaining investment, and ultimately to a satisfied customer.
- Willingness to revisit the model regularly and for new customer segments. As you proceed, what are you learning from your consumer about how to improve your product or about its utility in general?

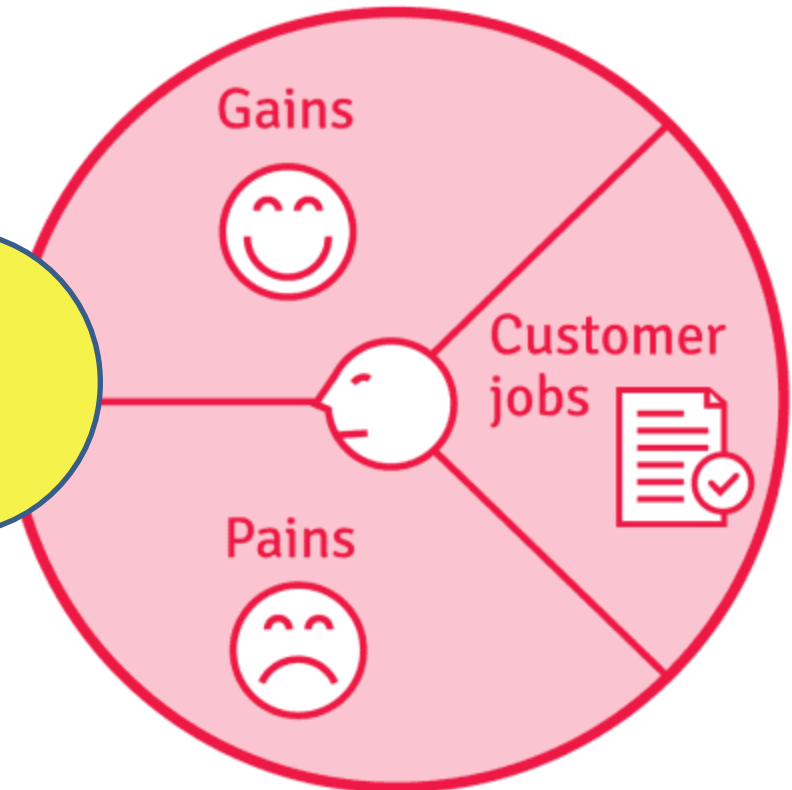
# IDENTIFYING CUSTOMER VALUES AND PRODUCT FIT

## Value Map



(Elements of Study Design)

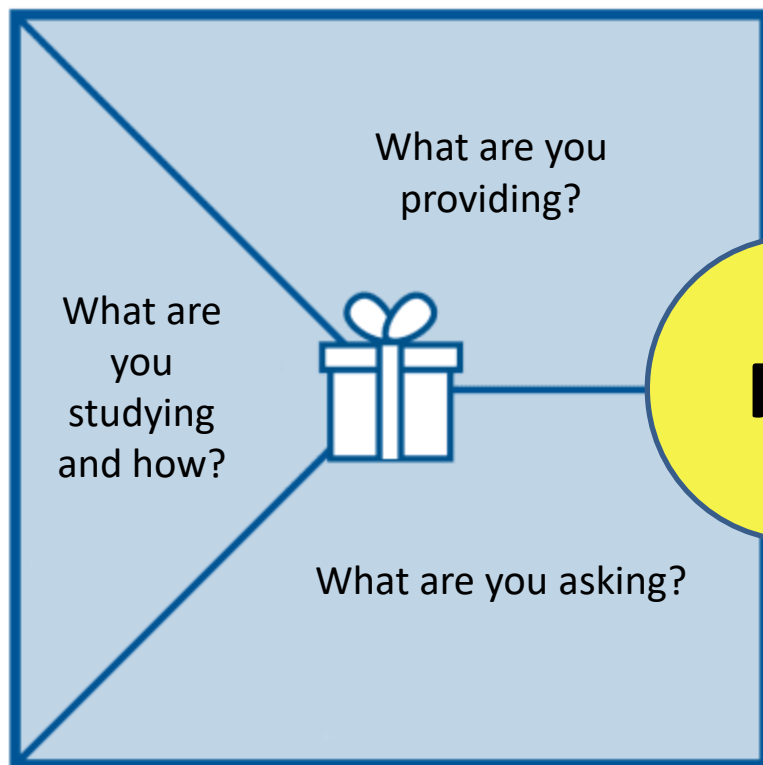
## Customer Profile



(Participant Profile and Values)

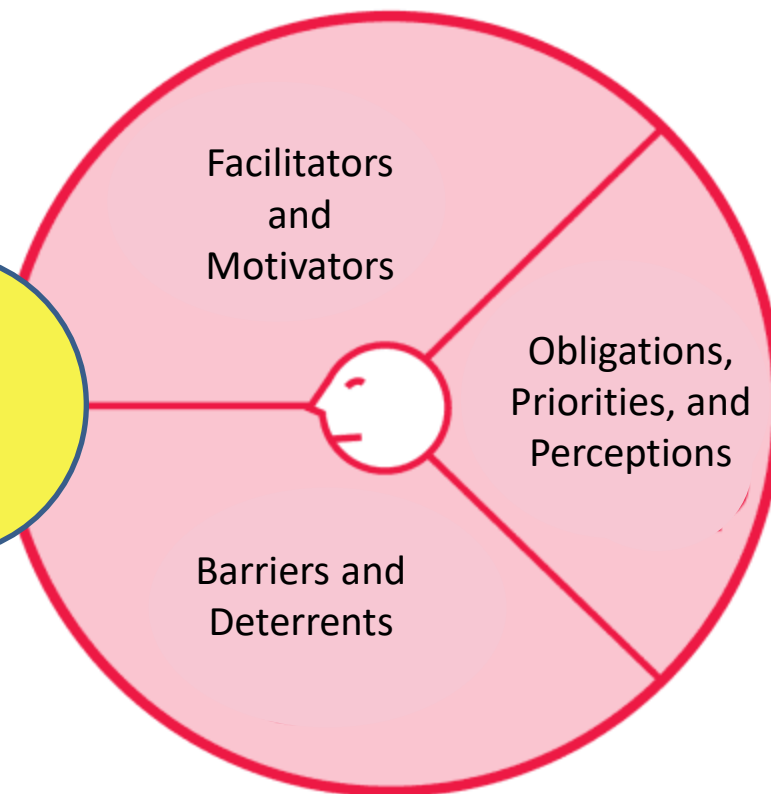
# IDENTIFYING CUSTOMER VALUES AND PRODUCT FIT

## Value Map



**(Elements of Study Design)**

## Customer Profile



**(Participant Profile and Values)**



# CUSTOMER PROFILE

Step into the shoes of your customer. How well do you understand their perceptions, priorities, and concerns?

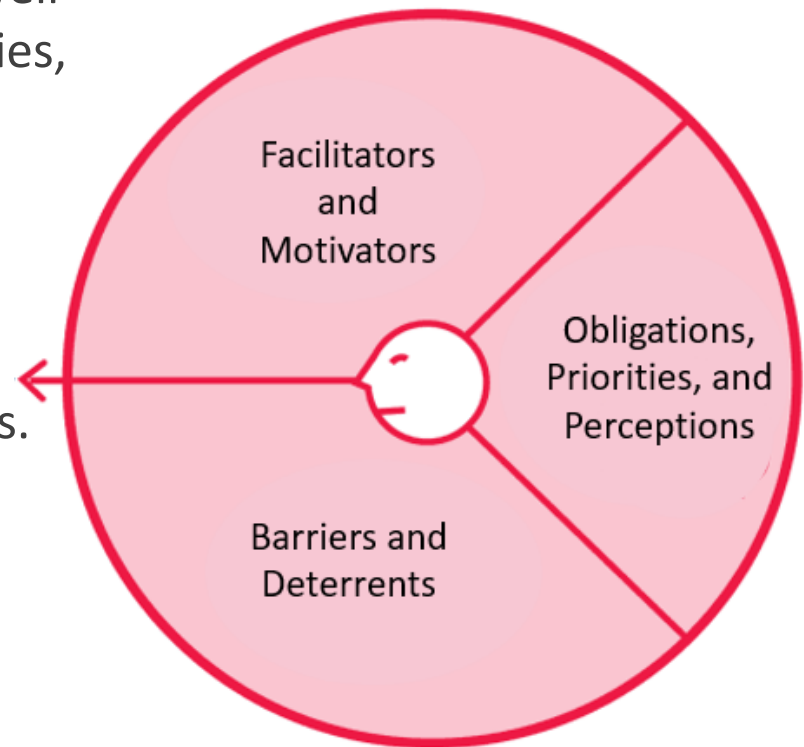
Objective:

Visualize what matters to your customers.

Clarify your understanding of your customers.

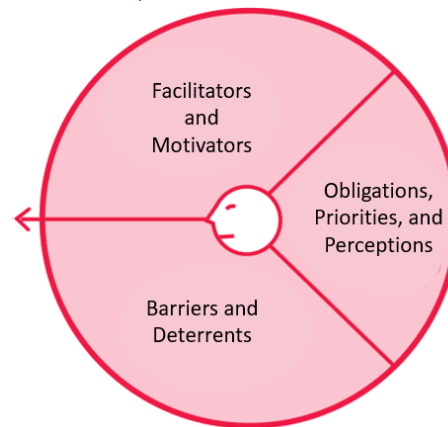
Steps:

1. Select and define customer segment
2. Identify elements in each bucket
3. Organize each section by customer priority



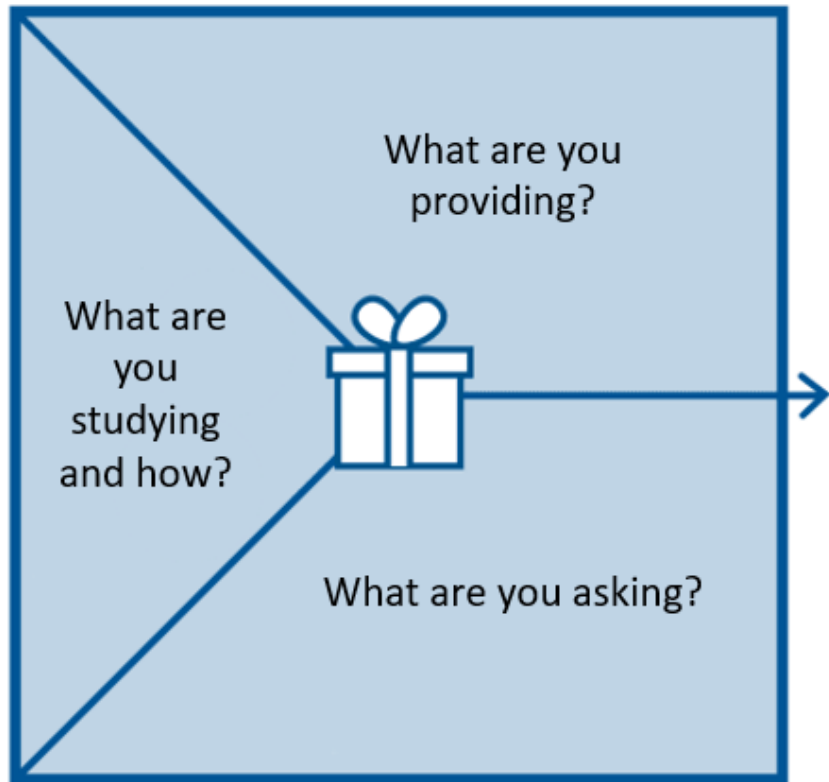
# BEST PRACTICES & COMMON MISTAKES

- One for each customer segment
- Social and emotional jobs are often more important than functional ones
- Forget what you plan to offer. The point is to consider the position of the customer the fact of what they need to do.
- Map everything. People are complicated. There should be lots of information.
- Ask “why” to dig deeper into jobs



- Mixing several customer segments into one profile
- Mixing jobs and outcomes
- Completing these lists with your own value proposition in mind.
- Limiting your scope
- Being too vague
- Focusing only on the functional jobs, neglecting social and emotional ones

# VALUE MAP



Now that you have a better idea of what is important to your customer, what can you do or provide to meet those needs?

What catches their eye to get them to get more information? What compels customers to buy our product?

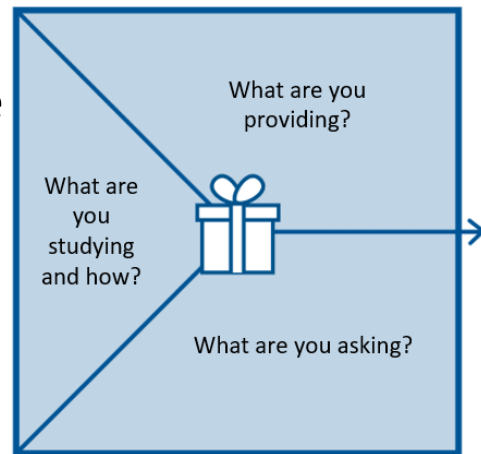
Objective: Describe explicitly how you intend to create value for that customer segment.

Steps:

1. Describe the elements of your study
2. Identify pain relievers and gain creators
3. Rank elements by priority
4. Identify fit to clarify messaging and core marketing

# BEST PRACTICES & COMMON MISTAKES

- List only the bundle of products and services that jointly form a value proposition for a specific segment
- Products and services aren't independently valuable. Value is always relative to customer profile
- Be honest about what you are able to address. You should make thoughtful choices regarding which needs your value proposition can address



- Listing all products and services, instead of those for specific segments
- Putting products or services in the pain reliever and gain creator fields
- Offering gain creators or pain relievers for things that are unrelated to pains or gains in the customer profile
- Try to address all pains and gains



# DANGER OF SKIPPING VALUE PROPOSITION

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It's possible to miss the mark on defining value at a number of different points in a study with a variety of outcomes. You could end up with the wrong message, approach, interaction strategy, design (facilitators), or motivators

- Recruiting healthy people with family history of alzheimers who do not exercise
- Using flyers to recruit for Overactive Bladder
- Weight loss study for rural African American women
- Recruiting people with HTN not currently on BP meds
- Leading recruitment with the fact that their medical records indicate they are eligible
- Storage of genetic material
- In-person approach and how much information you provide
- Parents of children with chronic conditions who have failed existing treatments

Outcome of value prop map could inform changes in messaging, changes in protocol, or changes in processes. Don't just follow original processes blindly - pay attention to what is happening, what you are hearing, and how you can adjust.

- 1. Research Participants Needed!**
- 2. Having a baby changed your life. How did it change your brain?**
- 3. Having a baby changed your life. Help us learn how it changes your brain.**
- 4. Baby blues got you down?**
- 5. Babies bring joy....and exhaustion. Can we help you lift the fog?**
- 6. Have a baby under 1?**
- 7. We need to take better care of new moms - help us figure out how we can help.**



# PARTICIPATE IN RESEARCH

Engaging parents and providers in the selection of evidence-based interventions: Improving transition to developmental/rehabilitation services

**Are you the parent/guardian of a child who was born preterm and has a developmental disability? OR A neonatal healthcare provider in Ontario? Consider participating in our research study.**

**Principal Investigator:**

Dr. Janet Yamada

**Site Investigator:**

Dr. Marilyn Ballantyne

**Co-investigator:**

Dr. Souraya Sidani

**Contact Information:**

To ask questions or to sign up, contact Amie Kron at [akron@hollandbloorview.ca](mailto:akron@hollandbloorview.ca)

Date Posted:

Version Date: July 5, 2018

REB: 18-787

**What is the study about:**

Parents/guardians of children with developmental disabilities experience high levels of stress when transitioning to rehab services. We want to get your opinion on programs that might be able to improve parents'/guardians' transition experiences.

**Who can participate?**

Parents/guardians of children who were born preterm and have a developmental disability *OR* healthcare providers of Ontario Neonatal Follow-up Programs/Children's Treatment

**What's involved?**

One-time completion of an interview/focus group (~60 minutes). Interviews can occur in-person or by phone/Zoom.

**Potential Benefits?**

The information from this study will be used to help create or improve programs to make the transition to rehab services easier for parents/guardians.

**Potential Risks?**

The risks are very low/minimal. The interview questions might cause feelings of discomfort.

*\*Participants will receive \$20 to honour their participation in the study.*





# AUTISM RESEARCH STUDY



## Do You Love a Child with Autism?

The Rebecca Center for Music Therapy is looking for children with autism spectrum disorder (ASD) to participate in a research study to learn if music therapy could be an helpful early treatment for children with ASD.

Each child in this study will receive 10 no-cost music therapy sessions, complete diagnostic and cognitive assessments, and a musical instrument to keep. Compensation is provided for family effort.

- Who is Eligible?
- Children ages 4-7
  - Diagnosed with ASD
  - Limited or no prior music therapy

The Rebecca Center for Music Therapy at Molloy College  
1000 Ferris Road Avenue  
PO Box 5002  
Rockville Centre, NY 11571-5002

Join the Musical Revolution Today!  
[www.AutismMusicStudy.org](http://www.AutismMusicStudy.org)  
[autismmusicstudy@rebecca.org](mailto:autismmusicstudy@rebecca.org) 123-555-5555

- You are an RA recruiting in a pediatric clinic
- The doctors there don't really do research, but have partnered with your PI to let you recruit there in-person.
- You are approaching new mothers at first pediatric visit
- The mother is research-naïve
- You need to enroll within first 4 weeks of baby's life to give an experimental vaccine designed to protect the baby from meningitis B
- Involves 7 clinic visits (5 occur at existing clinic appts) and 13 phone calls over 2 years
- There will be 4 blood draws between age 6 months-18 months

I am conducting a research study to determine information preference of caregivers for people with aphasia after stroke. I am calling you because you have been identified as a caregiver for someone with aphasia after stroke.

The purpose of this study is to learn about information preferences for caregivers of people with aphasia after stroke. We know that caregivers need information about how to navigate recovery and communication with their loved ones after stroke, but we would like to know more about when caregivers need this information, who should provide the information, and in what form.

If you decide to participate in the study, you will participate in a total of five one-hour interviews over the course of the next six months. Three of the interviews will take place while your loved one is still receiving care at the hospital, and two of the interviews will be conducted after your loved one has been discharged. You can stop participation at any time, and your loved one's rehabilitation will not be affected.

In order to participate, you should be 18 years or older and the primary caregiver for someone with aphasia after stroke. The person with aphasia should have no documented history of progressive neurological disease, psychiatric illness, developmental disorder, or substance abuse. You should also have no significant psychological or physical health impairment, and you should be comfortable with spoken English.

**Purpose:**

To (1) assess the reproducibility of masked hypertension (MH) and evaluate the agreement between home blood pressure (BP) monitoring and ambulatory BP monitoring in the identifying MH, (2) identify demographic, psychological, and clinical factors associated with MH, and (3) explore the degree of target organ damage and subclinical atherosclerosis associated with MH.

**Participants:**

420 adults not under treatment for hypertension recruited from 12 primary care practices.

**Procedures:**

Two sets of office, ambulatory, and home BP measurements will be performed one week apart. Other measures will include serum glucose, lipids, and C-reactive protein, urine albumin, left ventricular mass index, coronary artery calcium, perceived stress, job and home strain, and trait anger.

Additionally, we will pilot test questionnaires to assess patient confidence in various BP measurement techniques in this group of participants who have undergone multiple sessions of office, home and ambulatory BP monitoring.

### **Purpose:**

The purpose of this study is to examine the effect of labeling food with physical activity calorie expenditure (PACE) information as opposed to standard calorie information and see if PACE labeling will lead to lower calorie food purchasing.

### **Participants:**

Participants will be approximately 3600 Workplace X employees. A subset of 381 employees will be selected to participate in individual level data cohorts.

### **Procedures (methods):**

In a partnership with Workplace X of Chapel Hill, Durham and Charlotte, we will collect information on calories purchased and gym use at each of the worksite cafeterias. We will use a three-group interrupted time-series controlled trial design to assess the effects of PACE labels on food choices and physical activity behaviors. Additionally, we will track individual-level information for a smaller cohort of individuals.

# REMEMBER

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- There is no one-size-fits-all approach – you need to remain attentive to the market and flexible in your tactics.
- Have you filled up one cohort? Do you need more diversity? Change your customer profile to assess if they have different values that could be highlighted in campaigns and recruitment.
- Observe and listen to your customers as the study proceeds – what other things of importance are coming up? What are the reasons people are declining? What needs and wants are they voicing?
- The perspective of the intended participant should inform study planning and design, recruitment strategies, recruitment messaging, and ongoing communication throughout the study.

# REVIEW

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Start with defining your customer segments

Create a customer profile for each segment and prioritize

Look at and critically evaluate your:

- study question, study design, protocol, participation facilitators, participation barriers

Use that information to create a value map for each customer profile

Look at the fit:

- where are you already providing value that you can highlight?
- what essential elements are not being addressed?
- are you able to make changes to add value informed by those elements?
- what elements do you see that you need to be prepared to speak to if your study does not address them?

Use this knowledge to inform your:

- Marketing and recruitment materials
- Screeners, pitches, approaches
- Empathetic approach, expectation management, and retention strategies

# Thank you!

***Make it Clear: Lay Language Best Practices for Recruitment***

September 29, 12 – 1 p.m.

Presenter: Summer Choudhury, MPH

***Designing Effective Recruitment Materials***

October 6, 12 – 1 p.m.

Presenter: Anna Sarnelli, MA

<https://go.unc.edu/tracsFRS>

***Material Design Workshop***

October 13, 12 – 2 p.m.

<https://go.unc.edu/MDWoct13>

Recruitment Drop In – Virtual Office Hours  
3<sup>rd</sup> Wednesday of each month, 12p-2p (next: 10/20)

<https://go.unc.edu/recruitmenthour>

Request a free consultation with our team:

<https://go.unc.edu/recruitment-intake>

How'd we do? We'd love feedback on today's presentation:

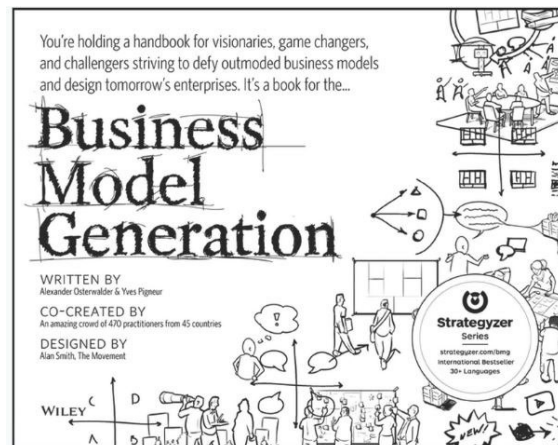
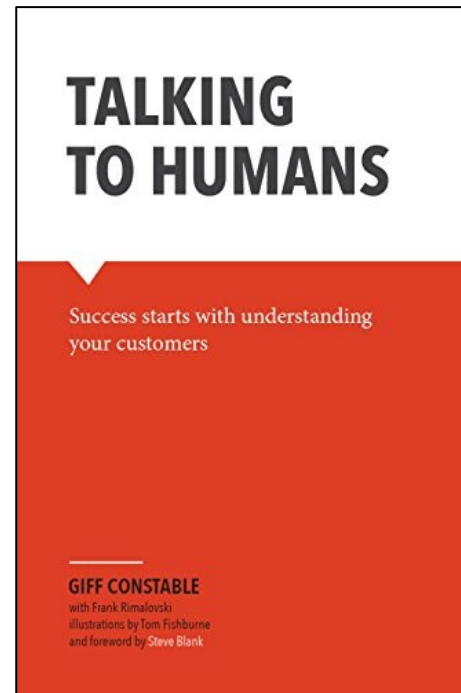
<https://reports.tracs.unc.edu/surveys/?s=TP8M48NN9C9HCTEE>



# BACKGROUND & ACKNOWLEDGEMENTS

NATIONAL CANCER  
INSTITUTE

HOME ABOUT THE TEAM HOW TO APPLY BENEFITS COURSE MATERIALS AND RESOURCES



# RESOURCES

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- Selected content adapted from: Abby Olena, [abbyolena.com](http://abbyolena.com)
- Baron 2005: [Escape from the Ivory Tower](#) by Nancy Baron (clear messaging)
- Dahlstrom 2014: Using narratives and storytelling to communicate science with nonexpert audiences
- Davies 2008: Constructing Communication – talking to scientists about talking to the public (overview of the deficit model and basic info about framing)
- Gulbrandsen et al. 2013: Long-term effect of communication training on the relationship between physicians’ self-efficacy and performance (a study relating communications training to physicians’ self-efficacy and performance)
- Jackson, Back 2011: Teaching communication skills using role-play, an experience-based guide
- Ko 2016: In science communication, why does the idea of a public deficit always return? How do the shifting information flows in healthcare affect the deficit model of science communication?
- Scheufele 2006: Messages and Heuristics – How audiences form attitudes about emerging technologies.
- Scheufele 2014: Science communication as political communication (good info about framing)
- Rangel, Lisa: Career Advancement and Reinvention Blog – 7 tips on how to create your 30 second elevator pitch
- <https://corporatefinanceinstitute.com/resources/knowledge/strategy/value-proposition/>
- Rhodes, SD, et al. “Selling the Product: Strategies to increase recruitment and retention of Spanish-speaking Latinos in biomedical research”. J Clin Transl Sci. 2018 Jun;2(3):147-155. doi: 10.1017/cts.2018.314. Epub 2018 Oct 21.