AVERY & RILEY

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AI Vendor Pulse

An advisory briefing on AI vendors selling into pharma & biotech

ISSUE 14 THE SUPPLY CHAIN MEETS THE AGENT — AI IN CLINICAL SUPPLY & RTSM/IRT

Suvoda
Agentic RTSM + Greenphire merger

Endpoint Clinical
Elosity eloAI + Bluefin deal

4G Clinical
Prancer RTSM + 4C Supply forecasting

YPrime
eCOA + IRT with AI localization

Cenduit
Now IQVIA IRT (formerly Cenduit)

Companies featured in this issue may include current or prospective advisory relationships of Avery & Riley. All data is publicly sourced unless otherwise noted; company-stated claims are labeled as such throughout.

WHY THIS ISSUE EXISTS

The supply chain meets the agent — AI reaches randomization and trial supply

Randomization and trial supply management (RTSM, also called IRT) is the system that assigns each patient a treatment and keeps blinded drug in the right depot at the right time. It is also where a wrong answer is physical: a stock-out or a mis-kit lands at a site, not on a dashboard. In 2026 the category began shipping AI — Suvoda introduced agentic RTSM[1], Endpoint Clinical released eloAI[2], and YPrime launched an AI eCOA calculation engine[3] — while ownership moved underneath it. This issue maps five vendors in that shift.

WHAT SENIOR LEADERS SHOULD WATCH

01

Build time is the first target. Vendors aim AI at the RTSM build-to-UAT cycle; Suvoda claims up to 80% less time (company-stated)[1]. The evidence so far is vendor-reported and early-adopter only.

02

Supply data becomes conversational. Endpoint's eloAI[2] and Suvoda's Sofia[4] let teams ask questions of RTSM data in plain language. Blinding and role-based access become the diligence item.

03

The category is consolidating. Suvoda merged with Greenphire[5], Endpoint bought forecasting firm Bluefin[6], and Cenduit is now sold as IQVIA IRT[7]. Ownership is part of the diligence.

The Avery & Riley 10-stage clinical-development taxonomy

Coverage bars throughout this issue map each vendor against the ten trial-lifecycle stages below — a **directional, point-in-time read** of where a vendor appears to operate. Each lit stage is colored by **source class** — **teal** where coverage is publicly documented (named customers or third-party sources), **gold** where coverage is company-stated. This issue's clinical-supply cohort clusters in set-up through oversight (P04–P07). For RTSM vendors we treat randomization as the enrollment-linked step (P05).

P01 Portfolio / indication strategy	**P02** Protocol design / feasibility	**P03** Site identification / selection	**P04** Study startup	**P05** Recruitment / enrollment
P06 Study conduct / execution	**P07** Monitoring / oversight	**P08** Data management / cleaning / DBL	**P09** Close-out / TMF / inspection readiness	**P10** Post-trial insights / evidence



Directional reads from public materials & directory review — a snapshot, not vendor-reported metrics.

LIFECYCLE FOOTPRINT SNAPSHOT

Where each supply vendor plays across the trial lifecycle

VENDOR	P01	P02	P03	P04	P05	P06	P07	P08	P09	P10	FOOTPRINT
Suvoda RTSM + payments, agentic build				■	■	■	■				4/10
Endpoint Clinical RTSM, eloAI agents, forecasting		■		■	■	■	■				5/10
4G Clinical RTSM + NLP-assisted forecasting				■	■	■					3/10
YPrime eCOA + IRT, AI on eCOA side				■	■	■					3/10
Cenduit Enterprise IRT, now inside IQVIA				■	■	■	■				4/10

■ Publicly documented (named customer / third-party) ■ Company-stated positioning

The cohort clusters in set-up through oversight (P04–P07), where blinded randomization and drug supply are configured and run. Footprint counts the stages a vendor is positioned to touch; a directional, point-in-time read, not a ranking.

Executive market map

VENDOR	PRIMARY CATEGORY	PROBLEM(S) TARGETED	PUBLIC EVIDENCE SIGNAL
Suvoda	Agentic RTSM + trial payments platform	RTSM build-to-UAT time; disconnected randomization, supply, eCOA and payments tools.	**Merger-built platform.** Everest RTSM PEAK Leader (Dec 2025)[8]; agentic RTSM Apr 2026, up to 80% faster to UAT (company-stated)[1].
Endpoint Clinical	RTSM with eloAI agents + supply forecasting	RTSM build and supply planning disconnected from live enrollment and trial data.	**Acquirer.** Everest Leader (Dec 2025)[9]; eloAI in Elosity R3 (Apr 2026)[2]; bought Bluefin (Sep 14, 2026)[6].
4G Clinical	RTSM + AI query tool + supply forecasting	RTSM build speed, mid-study change and clinical supply forecasting.	**Quiet signal.** $230M+ growth equity (2021)[10]; AI query tool is undated product-page text[11]; few dated 2026 signals found.
YPrime	eCOA + IRT/RTSM with AI localization	eCOA localization and build effort; adherence; IRT in a single eClinical stack.	**Adjacent.** Two Clinical Trials Arena awards (Dec 2025)[12]; AI calculation engine (Apr 2026)[3]; AI evidence sits on the eCOA side.
Cenduit	Enterprise IRT/RTSM — now marketed as IQVIA IRT	Global randomization and supply continuity for complex, blinded studies.	**Absorbed.** Now "IQVIA IRT, formerly known as Cenduit" (Aug 2025)[7]; covered in ISR's 2025 IRT benchmarking[13].

Signals summarize public materials as of the cited profiles that follow; company-stated claims are labeled as such.

Suvoda

LIFECYCLE FOOTPRINT 4/10

AGENTIC RTSM + TRIAL PAYMENTS PLATFORM

Targets: *The slow, manual RTSM/IRT build cycle, and the fragmented site, patient and payment tooling around it.*

WHAT THEY DO

- Suvoda sells RTSM/IRT and eCOA; after the Greenphire merger the platform unifies study data, patient engagement, scheduling and payments.[14]
- Agentic RTSM (announced Apr 21, 2026) uses AI agents across configuration and testing — up to 80% less time kickoff-to-UAT, as little as two weeks (company-stated), with a select group of early adopters at launch.[1] The Sofia assistant for querying trial data followed for new Suvoda RTSM/IRT and eCOA studies.[4]

COMPANY & BACKING

- Merger with Greenphire completed in April 2025; the combined company operates as Suvoda.[5]
- Thoma Bravo is the lead strategic investor, with Bain Capital Tech Opportunities and LLR Partners holding significant minority stakes.[15]
- Named a Leader in Everest Group's 2025 RTSM Products PEAK Matrix (announced Dec 2025).[8]

LIFECYCLE FOOTPRINT — RTSM CORE + SUPPLY INSIGHT

P04 · P05 · P06 · P07

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10
			■	■	■	■			

6,000+[14]
Trials across 115+ countries, combined company (company-stated)

up to 80%[1]
Shorter kickoff-to-UAT with agentic RTSM (company-stated, early adopters)

Leader[8]
Everest Group RTSM PEAK Matrix 2025 (assessment announced by vendor)

SENIOR-LEADER READOUT

The most broadly bundled RTSM in the cohort, now pairing agentic build with payments and patient tooling after the Greenphire merger.

The 80% claim is a best-case, early-adopter figure — ask for build timelines matched to your protocol complexity before using it as a planning number.

Company-stated claims summarized from public materials; not a buying recommendation.

Endpoint Clinical

RTSM WITH ELOAI AGENTS + SUPPLY FORECASTING

Targets: *Complex randomization and drug-supply logistics — slow RTSM build and mid-study change, and supply decisions made without live trial data.*

WHAT THEY DO

- Elosity is Endpoint's RTSM platform; its R3 release (Apr 13, 2026) added eloAI — natural-language queries of RTSM and supply data — plus central pharmacy management and portfolio-level supply optimization (company-stated).[2]
- The elo AI layer is described as role-based agents (design, audit, monitoring, supply) with human-in-the-loop review, and blinding preserved (company-stated).[2,16]

COMPANY & BACKING

- Fortrea divested Endpoint Clinical to Arsenal Capital Partners; the sale closed on Jun 4, 2024.[17]
- Acquired Bluefin, a Boston supply-forecasting software maker, on Sep 14, 2026 (terms undisclosed); Bluefin stays independent and connects to other RTSM systems.[6]
- Named a Leader in Everest Group's 2025 Life Sciences RTSM Products PEAK Matrix (announced Dec 2025).[9]

LIFECYCLE FOOTPRINT — RTSM + AI AGENTS + SUPPLY PLANNING

P02 · P04 · P05 · P06 · P07

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10
	■		■	■	■	■			

1,750+[17]
Trials supported over 15+ years, at the 2024 divestiture (company-stated)

Sep 2026[6]
Bluefin acquisition — supply forecasting joins RTSM; terms undisclosed

Leader[9]
Everest Group RTSM PEAK Matrix 2025 (assessment announced by vendor)

SENIOR-LEADER READOUT

The cohort's clearest case of RTSM and forecasting converging, and of a PE-backed platform buying its way into supply planning.

Worth an early look for sponsors wanting one data spine from randomization to supply plan; probe how eloAI agents are validated within blinding rules.

Company-stated claims summarized from public materials; not a buying recommendation.

4G Clinical

RTSM + AI QUERY TOOL + SUPPLY FORECASTING

Targets: *Faster, more flexible randomization and supply management, with forecasting that anticipates demand and mid-study change.*

WHAT THEY DO

- Prancer RTSM covers randomization, trial supply management, forecasting, reporting and integrations; 4C Supply adds scenario-based forecasting that connects to Prancer and third-party IRT systems.[11,18]
- AI: the product page lists a self-contained AI tool inside Prancer that lets users query reporting data, and names AI agents as a longer-term goal for 4G DataHub — undated statements (company-stated).[11]

COMPANY & BACKING

- Founded 2015; says it supports 100+ biotech and pharma clients (2021, company-stated).[19]
- Growth equity of more than $230M backed by Goldman Sachs Asset Management (June 2021).[10]
- Named customer: Decibel Therapeutics.[20] Gold sponsor of the IRT & RTSM conference, Oct 6–7, 2026.[21]

LIFECYCLE FOOTPRINT — RTSM CORE

P04 · P05 · P06

P01	P02	P03	**P04**	**P05**	**P06**	P07	P08	P09	P10

$230M+[10]
Growth equity backed by Goldman Sachs Asset Management, 2021

100+[19]
Biotech and pharma clients supported, 2021 (company-stated)

up to 50%[19]
Faster first patient in than other providers, 2021 (company-stated)

SENIOR-LEADER READOUT

A scaled, well-funded RTSM specialist whose public AI story is the lightest in this cohort — the dated 2025–26 evidence we found is thin.

Ask directly what AI ships today versus the roadmap before setting it beside the agentic claims elsewhere.

Company-stated claims summarized from public materials; not a buying recommendation.

YPrime

ECOA + IRT/RTSM WITH AI LOCALIZATION

Targets: *Manual, error-prone eCOA localization and configuration work — with randomization and supply delivered in the same platform.*

WHAT THEY DO

- YPrime sells eCOA, IRT and eConsent; its Participant Hub (Apr 2026) targets adherence and dropout.[22]
- AI sits mainly on the eCOA side: AI-assisted localization and migration, and an AI-powered Calculation Engine (Apr 28, 2026) that turns natural-language descriptions into structured, traceable calculation logic. We found no AI claim for its IRT product.[3,12]

COMPANY & BACKING

- Founded 2006 (Malvern, PA); Flexpoint Ford made a growth investment announced in February 2019, with Ballast Point Ventures staying on as a minority investor.[23]
- Won two Clinical Trials Arena Excellence Awards in December 2025, including Innovation in AI.[12]
- In the sources reviewed we found no 2025–26 funding round, acquisition or named customer.

LIFECYCLE FOOTPRINT — ECOA-LED, IRT ALONGSIDE

P04 · P05 · P06

P01	P02	P03	**P04**	**P05**	**P06**	P07	P08	P09	P10

74%[12]
Fewer eCOA migration errors with AI-enabled workflow (company-reported, 15 studies)

67%[12]
Shorter localization review cycle (company-reported)

2[12]
Clinical Trials Arena Excellence Awards, Dec 2025

SENIOR-LEADER READOUT

The most adjacent member of the cohort: YPrime's strongest AI evidence is in eCOA, not IRT.

Relevant to sponsors buying eCOA and IRT together; for RTSM itself, ask what AI is on the IRT roadmap. The 74% and 67% figures are company-reported comparisons.

Company-stated claims summarized from public materials; not a buying recommendation.

Cenduit

ENTERPRISE IRT/RTSM — NOW MARKETED AS IQVIA IRT

Targets: *Keeping blinded, protocol-specific drug supply and randomization on track across global sites without stock-outs or waste.*

WHAT THEY DO

- IQVIA describes the product as a cloud-based RTSM solution built for faster study start-up, drug-supply optimization and oversight, positioned within its Patient Engagement Suite.[24]
- Its product page cites blocked, adaptive, Bayesian and custom randomization, plus automation, predictive analytics and remote monitoring for supply (company-stated); we found no dedicated generative-AI announcement.[25]

COMPANY & BACKING

- Formed in May 2007 as a 50/50 joint venture of Quintiles and Thermo Fisher Scientific.[26]
- IQVIA's August 2025 blog calls the product "IQVIA IRT, formerly known as Cenduit" — the brand has been absorbed into IQVIA's technology portfolio, and that is the signal.[7]
- An ISR 2025 IRT benchmarking report lists it as "IQVIA IRT (formerly Cenduit CIRT2)"; we did not see its rankings.[13]

LIFECYCLE FOOTPRINT — ENTERPRISE IRT, INSIDE A CRO-OWNED SUITE

P04 · P05 · P06 · P07

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10
			■	■	■	■			

2007[26]
Cenduit formed as a Quintiles–Thermo Fisher joint venture

IQVIA IRT[7]
Current product name — "formerly known as Cenduit" (Aug 2025)

2025[13]
ISR IRT benchmarking edition covering the product

SENIOR-LEADER READOUT

The incumbent-scale option: an RTSM with CRO-grade reach, now sold as IQVIA IRT inside a broader suite.

For buyers the question is less AI features — we found no dated AI launch — and more whether suite bundling and a CRO owner fit their vendor-neutrality needs.

Company-stated claims summarized from public materials; not a buying recommendation.

Three patterns to carry into your diligence

01

AI lands on build and query first

In the public record we reviewed, AI claims concentrate on study build and configuration (Suvoda[1], YPrime[3]) and natural-language access to supply data (Endpoint[2], 4G Clinical[11]). We found no independent evidence of AI changing randomization or resupply decisions.

02

Forecasting is being pulled toward the RTSM

Endpoint bought Bluefin and says it will keep operating independently across other RTSM systems[6]; 4G Clinical's 4C Supply connects to Prancer and third-party IRT[18]. Who owns the supply plan is becoming a design choice.

03

RTSM now travels in a bundle

Suvoda pairs RTSM with payments and patient tooling[14], YPrime with eCOA and eConsent[22], and Cenduit sits inside IQVIA's suite[24]. Ownership and bundling shape roadmap, pricing and vendor-neutrality.

THE BOTTOM LINE FOR ADOPTION

"Clinical supply is where operational AI turns physical: a wrong answer ends up in a depot, not a dashboard. Leaders who ask for evidence of control, blinding and validation now will set the terms before the category standardizes."

From market read to executive diligence

EXECUTIVE DILIGENCE QUESTIONS

- Which RTSM workflow most needs leverage first — study build and UAT, mid-study amendments, supply forecasting, or oversight queries?
- What is the evidence behind the AI claim — how many studies, what protocol complexity, measured against what baseline? Treat "up to" figures as best-case.
- How are blinding, role-based access, audit trails and GxP / 21 CFR Part 11 validation maintained when an AI agent acts on or reads RTSM data, and where does the model run?
- What does ownership mean for the roadmap — RTSM-agnostic forecasting, eCOA or payments bundling, or a CRO parent — and what happens on a change of control?

SUGGESTED CATEGORIES FOR FUTURE ISSUES

- Real-world evidence & HEOR platforms
- Manufacturing, CMC & Pharma 4.0 AI
- Site payments, budgeting & contracts
- AI medical information & contact centers (MICC)
- Regulatory information management (RIM) & submissions

Source standard. All data is publicly sourced unless otherwise noted. Company-stated claims are labeled as such and summarized from public materials; they are not independently validated performance guarantees.

References

Reference numbers are assigned by first appearance in the body and shown as sequential superscripts throughout this issue. Third-party analyst assessments are noted where a vendor announced them.

1 Suvoda — Agentic RTSM announcement (PR Newswire, Apr 21, 2026); up to 80% / two weeks kickoff-to-UAT (company-stated). prnewswire.com

2 Endpoint Clinical — Elosity R3 release with eloAI (PR Newswire, Apr 13, 2026) (company-stated). prnewswire.com

3 YPrime — AI-powered eCOA Calculation Engine (Apr 28, 2026) (company-stated). yprime.com

4 Suvoda — Sofia AI assistant now available for new trials (PR Newswire, Oct 2026) (company-stated). prnewswire.com

5 Suvoda and Greenphire — completion of merger (PR Newswire via StreetInsider, Apr 2025). streetinsider.com

6 Endpoint Clinical acquires Bluefin, clinical supply forecasting (PR Newswire, Sep 14, 2026). prnewswire.com

7 IQVIA blog (Aug 2025) — "IQVIA IRT, formerly known as Cenduit." iqvia.com

8 Suvoda IRT named a Leader, Everest Group RTSM PEAK Matrix (PR Newswire, Dec 2025) — third-party assessment, announced by vendor. prnewswire.com

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10 Clinical Trials Arena — 4G Clinical raises $230M, Goldman Sachs Asset Management (Jun 2021). clinicaltrialsarena.com

11 4G Clinical — Technology page: Prancer RTSM, AI query tool, 4G DataHub (undated; company-stated). 4gclinical.com

12 YPrime — two Clinical Trials Arena Excellence Awards (GlobeNewswire, Dec 9, 2025); 74% / 67% from 15-study comparison (company-reported). globenewswire.com

13 ISR Reports — 2025 IRT Benchmarking; lists "IQVIA IRT (formerly Cenduit CIRT2)"; rankings not reviewed. isrreports.com

14 Suvoda — unified platform release (BioBuzz); 6,000+ trials, 115+ countries (company-stated). biobuzz.io

15 Thoma Bravo — merger completion release; investor roster (Thoma Bravo, Bain Capital Tech Opportunities, LLR Partners). thomabravo.com

16 Endpoint Clinical — AI services page; elo agent architecture (company-stated). endpointclinical.com

17 Fortrea — divestiture of Endpoint Clinical to Arsenal Capital closes (Jun 2024); 1,750+ trials (company-stated). tipranks.com

18 4G Clinical — 4C Supply forecasting product page (company-stated). 4gclinical.com

19 4G Clinical — growth investment release (Kyodo News PR Wire, Jun 2021); founded 2015, 100+ clients, FPI up to 50% faster (company-stated). kyodonewsprwire.jp

20 Fierce Biotech — Decibel Therapeutics taps 4G Clinical for RTSM (date not confirmed). fiercebiotech.com

21 Informa Connect — IRT & RTSM 2026 (Oct 6–7, 2026), 4G Clinical sponsor page. informaconnect.com

22 YPrime — eCOA Participant Hub (GlobeNewswire, Apr 7, 2026) (company-stated). globenewswire.com

23 BioSpace — YPrime and Flexpoint Ford investment (Feb 2019); founded 2006, Malvern, PA. biospace.com

24 IQVIA — Interactive Response Technology fact sheet (formerly Cenduit) (company-stated). iqvia.com

25 IQVIA — Interactive Response Technology product page (company-stated). iqvia.com

26 BioSpace — Quintiles and Thermo Fisher form IRT joint venture (May 2007). biospace.com

Disclosure: Companies featured in this issue may include current or prospective advisory relationships of Avery & Riley. Lifecycle-footprint and source-class reads use Avery & Riley's vendor framework compiled from public materials and directory review; they are a snapshot of the latest publicly known data and may change as vendors ship or reposition capabilities. This is not a ranking and not a buying recommendation.