AI Vendor Pulse

An advisory briefing on AI vendors selling into pharma & biotech

ISSUE 12 THE FRONT DOOR OF THE TRIAL GOES AI — SITE SELECTION, FEASIBILITY & STUDY START-UP

Citeline
Trial & site intelligence + SmartSolutions AI

H1
HCP data graph + site-network AI

Phesi
RWD patient & investigator-site intelligence

WCG
Site enablement + ClinSphere AI start-up

ConcertAI
Agentic AI + oncology RWD

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 front door of the trial goes AI — from choosing sites to activating them

A trial is often won or lost before the first patient is screened — on which investigators and countries are chosen and how fast sites go live. The waste is well documented by the vendors themselves: Citeline's own blind test found trials used about 20% more investigators than needed,[1] and Phesi says poor country selection can cost up to $2.4M per trial[2] (both company-stated). In 2025–26 the front door filled up with AI: data owners layered LLMs over investigator databases, a provider-data company moved into site networks, a site-enablement company agreed to buy a contracting-AI startup, and an oncology RWD player launched agents. This issue maps five vendors rebuilding site selection, feasibility and start-up.

WHAT SENIOR LEADERS SHOULD WATCH

01

Selection becomes a data product. Investigator and site databases are being fused with claims, EHR and protocol parsing — Citeline's Patient Intelligence (Sep 2026)[3] and H1's Site Network Suite (Apr 2026).[4]

02

Start-up is the next bottleneck to automate. WCG's April 2026 agreement to acquire The Contract Network[5] and ConcertAI's site-activation workflows[6] target contracts, budgets and activation — not just selection.

03

Consolidation is the signal. Citeline data now feeds Evinova's Study Designer;[7] H1 took commercial rights to Novo Nordisk's StudyHub;[8] point tools are being absorbed into platforms.

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 tied to a named transaction, partnership or customer in the dated public record, **gold** where coverage is company-stated. This issue's cohort clusters in **Plan & Design through Set up (P02–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 vendor plays across the trial lifecycle

VENDOR	P01	P02	P03	P04	P05	P06	P07	P08	P09	P10	FOOTPRINT
Citeline Trial & site intelligence + SmartSolutions AI	■	■	■		■						4/10
H1 HCP data graph + site-network AI		■	■		■	■					4/10
Phesi RWD patient & investigator-site intelligence		■	■		■						3/10
WCG Site enablement + ClinSphere AI start-up		■	■	■	■						4/10
ConcertAI Agentic AI + oncology RWD		■	■	■	■					■	5/10

■ Named transaction / partnership in dated public record ■ Company-stated positioning

The cohort clusters in design-to-start-up (P02–P05), where sites and countries are chosen and activated; none of the five is evidenced in conduct, monitoring, data management or close-out. 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
Citeline	Trial & site intelligence	Over-sized, under-performing site lists: choosing investigators and countries from fragmented data before the protocol is final.	**Data incumbent.** Sitetrove: 500,000+ investigators (company-stated)[9]; Evinova partnership (Feb 2026)[7]; Patient Intelligence (Sep 2026)[3].
H1	HCP data graph + site network	Fragmented investigator and site data, and slow questionnaire-driven feasibility: finding the right PIs and sites for a protocol.	**Platform pivot.** Novo Nordisk StudyHub rights (Aug 2026)[8]; Site Network Suite (Apr 2026)[4]; Defacto Health acquisition (Sep 2026)[10].
Phesi	RWD patient + site intelligence	Non-enrolling sites and poor country choices: selecting lead-enrolling countries and sites from real-world patient data.	**Challenger.** ClinSite-selected sites enrolled up to 40% faster across 250+ trials (company-stated)[11]; Trial Accelerator V2 (Jan 2025)[12].
WCG	Site enablement + ClinSphere AI	Slow, disconnected start-up: feasibility, ethical review, contracts and budgets that gate first-patient-in.	**Consolidator.** Agreement to acquire The Contract Network (Apr 2026)[5]; Trial IntelX launch (Jan 2026)[13].
ConcertAI	Agentic AI + oncology RWD	Long, amendment-prone start-up: literature review, design, feasibility, site selection and activation run as disconnected steps.	**Agentic entrant.** ACT launched at SCOPE (Feb 2026)[14]; Exigent Research partnership (Feb 2025)[15].

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

Citeline

LIFECYCLE FOOTPRINT 4/10

CLINICAL-TRIAL INTELLIGENCE + SMARTSOLUTIONS AI

Targets: *Over-sized, under-performing site lists — choosing investigators and countries from fragmented data before the protocol is final.*

WHAT THEY DO

- Sitetrove and Trialtrove supply investigator, site and trial data; Sitetrove is described as covering 500,000+ investigators and 190,000 sites in 185 countries *(company-stated)*.[9]
- SmartSolutions layers ML and LLMs on that data — Investigator SmartSelect for protocol-specific investigator pools, Protocol SmartDesign for endpoint and criteria suggestions; Patient Intelligence (Sep 2026) adds claims/EHR-derived patient-population and access data to feasibility.[3,16]

COMPANY & BACKING

- Formerly Informa Pharma Intelligence; merged with Norstella in Nov 2022 (a ~$5B combined company), with Hg, WCAS and Warburg Pincus sharing joint control.[17]
- Feb 2026: multiyear partnership with Evinova — Sitetrove and Trialtrove data integrated into Evinova's AI-native Study Designer.[7]

LIFECYCLE FOOTPRINT — PLANNING & FEASIBILITY INTELLIGENCE

P01 · P02 · P03 · P05

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

500,000+[9]
Investigators in Sitetrove (company-stated)

~20%[1]
More investigators used than needed, in Citeline's own blind test (company-stated)

Minutes[16]
vs. 4–6 weeks to build a protocol-specific investigator pool (company-stated)

SENIOR-LEADER READOUT

The data incumbent for trial and site intelligence, now putting LLM decision support on top. Its leverage is the dataset — ask how selection recommendations are validated against your own enrolment history.

Performance claims here originate with Citeline's own analyses; request blinded evidence in your therapeutic area.

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

H1

HCP DATA GRAPH + SITE-NETWORK AI

Targets: *Fragmented investigator and site data and slow, questionnaire-driven feasibility — finding the right principal investigators and sites for a protocol.*

WHAT THEY DO

- H1's "Doctor Graph" maps healthcare professionals, investigators and sites; the company says its Site Universe grew from 48,000 to 100,000 mapped sites in two years, covering 90%+ of principal investigators worldwide *(company-stated)*.[18]
- Site Network Suite (Apr 2026) lets sites claim profiles, validate capabilities and answer feasibility questionnaires in one platform — a structured source of truth for sponsor site selection.[4]

COMPANY & BACKING

- Series C led by Altimeter in Nov 2021 ($123M including the extension), with Goldman Sachs Asset Management among the new investors.[19]
- Aug 2026: acquired commercial rights to Novo Nordisk's AI-enabled trial-execution platform StudyHub to pair with the Doctor Graph; Sep 2026: acquired Defacto Health, a provider-network data deal.[8,10]

LIFECYCLE FOOTPRINT — SITE INTELLIGENCE + EXECUTION PLATFORM

P02 · P03 · P05 · P06

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

100,000[18]
Mapped sites in the Site Universe, up from 48,000 in two years (company-stated)

90%+[18]
Share of principal investigators worldwide covered (company-stated)

$123M[19]
Series C total including extension (Nov 2021)

SENIOR-LEADER READOUT

A provider-data company moving from lookup to workflow — site profiles, feasibility and, via StudyHub, execution. Worth a conversation where site selection and enrolment sit on one data spine.

Its acquisitions are largely provider-data deals; ask how trial-specific the models and data actually are.

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

Phesi

RWD PATIENT + INVESTIGATOR-SITE INTELLIGENCE

Targets: *Non-enrolling sites and poor country choices — selecting lead-enrolling countries and sites from real-world patient data.*

WHAT THEY DO

- ClinSite is a self-service AI/SaaS tool using NLP and machine learning to find top-performing investigator sites, described as covering 4.2M physicians and ~600,000 sites *(company-stated)*.[11]
- Country selection (powered by real-time enrolment data from live trials) and an Investigator Site Profile with a composite performance score aim to weed out non-enrolling sites; Trial Accelerator uses Digital Patient Profiles to forecast enrolment.[2,20,21]

COMPANY & BACKING

- Founded in 2007 by Dr. Gen Li, formerly Head of Productivity for Pfizer Worldwide Clinical Development.[22]
- Trial Accelerator V2 (Jan 2025) reports data from 132M+ patients and 400,000+ cohorts *(company-stated)*; ownership and funding were not publicly confirmed in our review.[12]

LIFECYCLE FOOTPRINT — DESIGN, COUNTRY & SITE SELECTION

P02 · P03 · P05

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

Up to 40%[11]
Faster enrolment at ClinSite-selected sites across 250+ trials (company-stated)

132M+[12]
Patients in Trial Accelerator data (company-stated)

$2.4M[2]
Upper-bound cost per trial of poor country selection (company-stated)

SENIOR-LEADER READOUT

The most focused pure-play on "which countries and sites will actually enrol." Useful where site performance, not site count, is the diligence question.

All performance figures are Phesi's own; ask for held-out validation and for how its data is sourced.

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

WCG

SITE ENABLEMENT + CLINSPHERE AI

Targets: *Slow, disconnected start-up — feasibility, ethical review, contracts and budgets that gate first-patient-in.*

WHAT THEY DO

- ClinSphere spans AI-powered predictive trial design, site feasibility and selection, participant enrolment and ethical review, with The Contract Network adding AI contract and budget intelligence across study start-up once the deal completes.[23]
- Trial IntelX (Jan 2026) simulates designs against 80,000+ complete protocols and 40,000+ operationally benchmarked trials *(company-stated)*; Total Feasibility adds self-serve site evaluation.[13,24]

COMPANY & BACKING

- Formerly WIRB-Copernicus Group; recapitalized in 2019–20 by Leonard Green & Partners with Arsenal Capital (current ownership not re-confirmed for 2026).[25]
- Portfolio reshaping: sold its eCOA business to Clario (2025) and on Apr 21, 2026 agreed to acquire The Contract Network, an AI contracting/start-up platform; closing was not confirmed in our review.[5,26]

LIFECYCLE FOOTPRINT — FEASIBILITY THROUGH START-UP

P02 · P03 · P04 · P05

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

80,000+[13]
Complete protocols behind Trial IntelX (company-stated)

2×[24]
Site feasibility response rate vs. industry average, per WCG (company-stated)

300 in 10 days[27]
Site evaluations in one Total Feasibility case study (company-stated)

SENIOR-LEADER READOUT

A start-up-and-enablement consolidator: ethics review, feasibility and, if the deal completes, contracting AI under one platform. Relevant when activation speed, not site choice, is the bottleneck.

This is an announced agreement, not a closed deal in our review — confirm status before relying on the combined roadmap.

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

ConcertAI

AGENTIC AI + ONCOLOGY RWD

Targets: *Long, amendment-prone start-up — literature review, protocol design, feasibility, site selection and activation run as disconnected steps.*

WHAT THEY DO

- ACT (Accelerated Clinical Trials), launched at SCOPE 2026, is an enterprise agentic platform built on CARAai, with assistants and agents for literature review, protocol design, competitive trial analysis, feasibility, site selection and patient matching.[14]
- With Exigent Research (Feb 2025), ConcertAI deployed feasibility, patient-to-trial matching and study automation across Exigent sites.[15]

COMPANY & BACKING

- Founded in 2017 in Cambridge, MA; Series B of $150M (Jan 2020, SymphonyAI participating) and Series C of $150M from Sixth Street at about a $1.9B valuation (Mar 2022).[28,29,30]
- Multi-year agreement with Bayer on Translational360 and AI SaaS for precision oncology (date not confirmed in our review).[31]

LIFECYCLE FOOTPRINT — DESIGN TO ACTIVATION, PLUS RWD INSIGHTS

P02 · P03 · P04 · P05 · P10

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

10–20 mo[14]
Shorter overall trial timelines claimed for ACT (company-stated)

1–2 mo[6]
Faster site activation claimed (company-stated)

25%[6]
Fewer non-productive sites claimed (company-stated)

SENIOR-LEADER READOUT

The broadest agentic pitch in the cohort, anchored in oncology RWD. Its claims are the boldest and the least independently evidenced — a design-partner conversation, not a settled capability.

Ask for timeline results from named, completed studies rather than platform-level projections.

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

Three patterns to carry into your diligence

01

Site selection is a data-asset contest

Citeline, H1 and Phesi each compete on proprietary investigator and patient datasets, and their performance claims are largely their own. The question is how recommendations hold up against *your* enrolment history.

02

Start-up automation is the new frontier

WCG's planned Contract Network deal[5] and ConcertAI's activation workflows[6] move AI from choosing sites to activating them — contracts, budgets, ethics review.

03

Partnerships are rewiring the stack

Citeline data inside Evinova's designer,[7] StudyHub inside H1,[8] The Contract Network inside WCG: expect data, design and start-up layers to bundle — and plan data rights accordingly.

THE BOTTOM LINE FOR ADOPTION

"The trial is won or lost before the first patient is screened. Leaders who test AI site selection against their own enrolment history — and map where the data, design and start-up layers are consolidating — will shape this category rather than inherit it."

From market read to executive diligence

EXECUTIVE DILIGENCE QUESTIONS

- Which is your real bottleneck — site and country selection, feasibility response time, or contract-and-budget activation — and which vendor layer addresses it?
- How are site-ranking models validated — blinded, on held-out studies in your therapeutic area, against your own enrolment history?
- Whose data is it, and what rights do you have — to site and investigator data, to your own study data used for model training, and on exit?
- How do AI-assisted activation steps (contracts, ethics submissions) stay auditable, human-reviewed and inspection-ready?

SUGGESTED CATEGORIES FOR FUTURE ISSUES

- Real-world evidence & HEOR platforms
- Clinical supply & RTSM
- Site payments & budgeting
- AI medical affairs & medical information
- Regulatory information management (RIM)

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.

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