AVERY & RILEY

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AI Vendor Pulse

An advisory briefing on AI vendors selling into pharma & biotech

ISSUE 05 THE AGENTIC FRONTIER — AI-NATIVE CHALLENGERS REBUILDING THE TRIAL

Truco
AI source-to-EDC data-entry automation

Confyde AI
AI-native clinical-development planning

Epistemix
Agent-based population simulation

OmniScience
Agentic trial control tower (Vivo)

Double Blind Bio
Agentic site & sponsor enablement

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 incumbents host clinical AI. These challengers want to *be* it.

Issue 04 profiled the data & cloud incumbents that **host** clinical AI. This issue turns to the **challengers** — a cohort of AI-native, agent-first startups deploying autonomous agents (and, in one case, agent-based simulation) directly into trial workflows. They are young, fast-moving, and built agent-first from day one. This is the cohort to meet **early** — while roadmaps are still being shaped and design-partner seats are open.

WHAT SENIOR LEADERS SHOULD WATCH

01

Challengers, not incumbents. Every vendor here is AI-native and agent-first, founded 2018–2025, mostly under 50 people. The bet is that agents rebuild trial workflows from scratch — not bolt onto legacy systems.

02

Early engagement is leverage. These teams are actively seeking design partners and lighthouse customers. Sponsors who engage now shape the roadmap and secure early-adopter economics.

03

Evidence is compounding. Named deployments, analyst recognition, and ecosystem partnerships are already landing across the cohort — the public proof curve is bending upward.

THE MEASURING STICK

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.

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 challenger plays across the trial lifecycle

Vendor	P01	P02	P03	P04	P05	P06	P07	P08	P09	P10	Footprint
Truco Source-to-EDC data-entry automation						■	■	■	■		4 /10
Confyde AI AI-native clinical-dev planning	■	■	■		■						4 /10
Epistemix Agent-based population simulation	■	■									2 /10
OmniScience Agentic trial control tower (Vivo)					■	■	■	■	■		5 /10
Double Blind Bio Agentic site & sponsor enablement		■	■	■	■						4 /10

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

Footprints today largely reflect company-stated positioning (gold); teal marks stages backed by public documentation — named customers or third-party sources. Footprint counts the stages a vendor is positioned to touch; a directional, point-in-time read, not a ranking.

THE SENIOR-LEADER VIEW

Executive market map

VENDOR	PRIMARY CATEGORY	PROBLEM(S) TARGETED	PUBLIC EVIDENCE SIGNAL
Truco	AI source-to-EDC data-entry automation	Manual site data entry, source-to-EDC transcription, and endless query cycles that delay database lock (company-stated).	**Company-stated:** 10× faster entry, ~60% fewer queries, ~30% data-mgmt cost savings; **$1.5M** pre-seed (AIX Ventures, 2024).
Confyde AI	AI-native clinical-development planning	Protocol drafting, study design, TPP, site ranking, enrollment & budget forecasting.	**Live & shipping.** Production platform with shipped releases (Jul & Sep 2025); PharmStars Spring 2026 cohort; metrics company-stated.
Epistemix	Agent-based population simulation	Disease & population modeling on synthetic populations; trial design (protocol, sample size, endpoints) is the natural frontier.	**Proven science.** FRED framework with University of Pittsburgh lineage; Populus 1:1 US synthetic population; Gigasheet & PolicyMap partnerships.
OmniScience	Agentic clinical-trial control tower (Vivo)	Real-time safety, enrollment & data-quality oversight across EDC, labs, CTMS, safety & PRO systems.	**Two named live trials on Vivo:** INmune Bio (Ph 2) & BridgeBio (Ph 3 achondroplasia); LabConnect partner; IDC "Vendor to Watch"; JLABS resident.
Double Blind Bio	Agentic site & sponsor enablement (DeBBy)	Site trial discovery, feasibility automation, sponsor-side site selection & activation.	**Pedigreed & funded.** Ex-Flatiron / Verily / Google team; CRIO Partner Program integration; $7M+ (2025) from Define Ventures, SignalFire & Peterson.

Prepared for market education; not a buying recommendation.

Truco

LIFECYCLE FOOTPRINT (COMPANY-STATED)
4 /10

AI SOURCE-TO-EDC DATA-ENTRY AUTOMATION

Targets: *Automating source-data entry into EDC — and cutting the endless query cycles that manual transcription creates (company-stated).*

WHAT THEY DO

- Automates source-data entry into EDC — a **reusable site-data layer** ingests EHR, PDFs, eSource, labs and visit notes; a **study-specific AI layer** maps them to each protocol's CRFs and the sponsor's EDC format (company-stated).[1]
- Output is review-ready, pre-filled CRFs with linked source evidence and a compliant audit trail — coordinators stay human-in-the-loop, and the site connection is reused across every future study.[2]

COMPANY & BACKING

- Founded 2023 in San Francisco by an ex-NVIDIA / You.com founder; a lean, technical team with 10+ years of ML experience.[3]
- $1.5M pre-seed (Jan 2024) backed by AIX Ventures, Firestreak Ventures, FYSK and Team Ignite.[3]
- Early on the clinical go-to-market: public pilots and case studies are the next milestones to watch.[1]

LIFECYCLE FOOTPRINT — COMPANY-STATED POSITIONING

P06 · P07 · P08 · P09 (COMPANY-STATED)

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

10×[1]
Faster source-data entry & verification (company-stated)

~60%[1]
Fewer avoidable data queries & discrepancies (company-stated est.)

~30%[1]
Data-management cost savings (company-stated est.)

SENIOR-LEADER READOUT

A focused source-to-EDC data-automation platform attacking the single most universal site pain point — manual data entry — with concrete company-stated gains.

The reusable site-data layer is the strategic bet: learn a site once, reuse across every study. Worth a conversation for sites and sponsors feeling the data-entry and database-lock squeeze — proof points remain company-stated and early.

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

Confyde AI

LIFECYCLE FOOTPRINT
4 /10

AI-NATIVE CLINICAL-DEVELOPMENT PLANNING

Targets: *Front-loading early-phase planning — protocol drafting, study design, site ranking, enrollment forecasting, and budget / PTRS planning in one AI-native workspace.*

WHAT THEY DO

- A six-module clinical-development platform: Study Designer, Therapy Landscape, TPP Generator, Site Selection & Enrollment Forecasting, Resource / Revenue + PTRS, and Document Authoring aligned to FDA / EMA.[4]
- A live production stack (Next.js / FastAPI / Supabase); public release notes show two shipped features — Scenario Planning (Jul 2025) and Enrollment Forecasting (Sep 2025).[5]

TRACTION & MOMENTUM

- Selected into the PharmStars Spring 2026 accelerator — a pharma-buyer-matching cohort that puts the platform directly in front of sponsor decision-makers.[6]
- Performance figures are company-stated as the first public case studies develop.[7]
- Security posture published through a Vanta-hosted trust center; a focused 2–10-person founding team.[4]

LIFECYCLE FOOTPRINT — COMPANY-STATED

P01 · P02 · P03 · P05 (COMPANY-STATED)

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

500K+[7]
Clinical trials in the training corpus (company-stated)

~30%[7]
Scenario-planning time savings; site selection "8–12 wks → 2 wks" (company-stated)

Spring '26[6]
PharmStars accelerator cohort (Digital Innovations in Ops & Outcomes)

SENIOR-LEADER READOUT

The clearest AI-native articulation in the cohort of "compress early-phase planning into one workspace," with a genuinely live product spanning indication strategy through enrollment forecasting.

The window is now: an ambitious team actively courting pharma partners through PharmStars. Bring one of your own protocols to a hands-on pilot and help shape the product while the roadmap is still open.

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

Epistemix

AGENT-BASED POPULATION SIMULATION

LIFECYCLE FOOTPRINT (FRONTIER)
2 /10

Targets: *Modeling disease dynamics and population behavior on synthetic populations — a capability whose* **natural next frontier is trial design** *(protocol optimization, sample size, endpoint selection).*

WHAT THEY DO

- Commercializes FRED — an agent-based simulation framework from the University of Pittsburgh — via the Populus platform and a 1:1 synthetic population of the United States.[8]
- FRED's academic lineage is well established (infectious-disease and public-health modeling); the commercial version is Epistemix-maintained.[9]

TRACTION & MOMENTUM

- Named partnerships in healthcare forecasting — Gigasheet (Nov 2025) — and public-health scenario planning with PolicyMap, including a ten-year Nevada diabetes-prevention simulation.[10,11]
- Positioning today centers on population health and cost / demand forecasting; the trial-design placement here is an Avery & Riley frontier read.[8]
- Founded 2018 in Pittsburgh; Ecliptic Capital-led seed (2022) and a Series A (Apr 2024).[12]

LIFECYCLE FOOTPRINT — AVERY & RILEY FRONTIER READ

P01 · P02 (FRONTIER)

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

1:1[8]
Synthetic population of the US (Populus platform)

2018[12]
Founded, Pittsburgh; home of the FRED framework

Nov 2025[10]
Gigasheet partnership — cost forecasting

SENIOR-LEADER READOUT

A genuinely differentiated capability: agent-based simulation with more than a decade of University of Pittsburgh academic lineage and a 1:1 synthetic population of the US — the raw material for in-silico trial design.

Sponsors exploring simulation-driven protocol optimization have a first-mover opening — a proven engine, ready to shape for trial design with a partner.

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

OmniScience

LIFECYCLE FOOTPRINT
5/10

AGENTIC CLINICAL-TRIAL CONTROL TOWER (VIVO)

Targets: *Replacing manual, after-the-fact reporting with continuous, source-backed oversight of safety, enrollment and data quality across fragmented trial systems.*

WHAT THEY DO

- Vivo — "the control tower for clinical development": unifies EDC, CTMS, labs, eCOA/ePRO, safety, IRT, imaging and wearables into one governed layer, with source traceability preserved.[13]
- Agentic AI over that layer — plain-language "Ask Vivo," continuous AI-RBQM monitoring, and portfolio intelligence, governed by RBAC, blinding-awareness and audit trails.[13]

TRACTION & MOMENTUM

- The cohort's strongest public proof: **two named live deployments** — INmune Bio's global Phase 2 Alzheimer's trial (Dec 2024) and BridgeBio's pediatric achondroplasia Phase 3 open-label extension, co-presented at SCOPE 2026.[14]
- LabConnect partnership for real-time lab insights (Sep 2025); named an IDC MarketScape "Vendor to Watch" (2025).[15,16]
- Johnson & Johnson JLABS resident (2025); TransCelerate forum member (2026); efficiency metrics company-stated as named case studies build.[17,18]

LIFECYCLE FOOTPRINT — TEAL = NAMED DEPLOYMENT, GOLD = COMPANY-STATED

P05 · P06 · P07 · P08 · P09

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

2[14]
Named live trials on Vivo (INmune Bio, BridgeBio)

6–8 wks[18]
Time to go live; "25% faster DB lock" (co-stated)

60–70%[18]
Fewer manual tasks; 50+ orgs (company-stated)

SENIOR-LEADER READOUT

The most substantiated challenger in the cohort: a clear agentic-oversight product, two named live trials (Ph 2 and Ph 3), a lab partner, and explicit governance (RBAC, blinding-aware, audit trails) — the things regulated buyers actually ask for.

With an ecosystem forming around it — LabConnect, JLABS, TransCelerate — this is the cohort's momentum story, and an ideal first conversation for sponsors ready to pilot agentic oversight.

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

Double Blind Bio

LIFECYCLE FOOTPRINT

4 /10

AGENTIC SITE & SPONSOR ENABLEMENT (DEBBY)

Targets: *The site–sponsor matchmaking gap — helping research sites win more trials and helping sponsors find and activate the right sites faster.*

WHAT THEY DO

- "Agentic infrastructure for clinical trials" — a two-sided product with AI agents automating site and sponsor workflows across the trial lifecycle.[19]
- Flagship agent "DeBBy": AI trial discovery (including trials beyond ClinicalTrials.gov), contact finding, feasibility-form automation, and personalized sponsor outreach.[19]

TRACTION & MOMENTUM

- Founded 2025 in San Francisco by a team drawn from Flatiron Health, Verily, Google and Stanford (company-stated pedigree).[19]
- CRIO Partner Program integration — site study data flows directly into DeBBy for faster feasibility completion; also integrated with Salesforce.[20]
- $7M+ raised (Dec 2025, per trackers) from Define Ventures, SignalFire and Peterson.[21]

LIFECYCLE FOOTPRINT — COMPANY-STATED POSITIONING

P02 · P03 · P04 · P05 (COMPANY-STATED)

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

$7M+[21]

Raised (Dec 2025, per trackers); Define / SignalFire / Peterson

2025[19]

Founded, San Francisco; ex-Flatiron / Verily / Google team

CRIO[20]

Partner Program integration — site study data flows into DeBBy

SENIOR-LEADER READOUT

A sharply scoped bet on site enablement and feasibility automation — one of the trial's most genuine pain points — with a credible ex-Flatiron / Verily team and a site-software partner integration (CRIO) that gives the agent real data to work from.

For site networks drowning in feasibility requests — sponsors wanting AI-driven site selection and activation — now is the moment to get on the early-customer list, while the founding team is still hands-on with every deployment.

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

CROSS-VENDOR PATTERNS FOR SENIOR LEADERS

Three patterns to carry into your diligence

01

Agents are arriving stage by stage

Planning (Confyde AI, Epistemix), setup & enrollment (Double Blind Bio), and conduct-to-close oversight (OmniScience, Truco). Together the cohort already spans most of the lifecycle.

02

AI-native is a structural head start

No legacy code, no bolt-ons — these platforms are agent-first from day one. Data access, workflow depth, and validation decide the winners, and early customers help build all three.

03

The proof curve is bending upward

Named deployments, analyst recognition, and ecosystem partnerships are landing across the cohort. Engaging early means shaping the evidence — not just reading it.

THE BOTTOM LINE FOR ADOPTION

"The trial is being rebuilt agent-first. Sponsors who engage this cohort now don't just buy software — they shape roadmaps, secure design-partner economics, and meet their next strategic vendors before the category consolidates."

HOW TO USE THIS ISSUE

From market read to executive diligence

EXECUTIVE DILIGENCE QUESTIONS

- Which lifecycle stages match where your team most needs leverage — planning, setup, or conduct?
- What engagement structure fits — design partnership, paid pilot, or a single-study deployment?
- How are agent actions governed — access control, audit trails, blinding-awareness — and what is the validation path for GxP / 21 CFR Part 11 use?
- What early-adopter advantages — roadmap input, reference-customer economics — are on the table?

SUGGESTED CATEGORIES FOR FUTURE ISSUES

- Agentic RBQM & risk-based monitoring
- AI protocol & study design
- In-silico simulation for trial design
- Site enablement & feasibility automation
- Data foundations for clinical AI (see Issue 04)

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 & SOURCES

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Reference numbers are assigned by first appearance in the body and shown as sequential superscripts throughout this issue.

1 Truco, product deck "Stop Drowning in Data Entry" (gamma.app) & homepage, truco.ai — source-to-EDC automation platform; company-stated outcomes (10× faster entry, ~60% fewer queries, ~30% data-management cost savings).

2 Truco, product materials (gamma.app) — reusable site-data layer, study-specific AI layer, review-ready EDC output with linked source evidence and human-in-the-loop review (company-stated).

3 PitchBook / Crunchbase / LinkedIn company profiles — Truco Ventures Inc., founded 2023, $1.5M pre-seed (Jan 2024), AIX Ventures.

4 Confyde AI, homepage, /solutions & /about, confyde.ai (six-module platform; Vanta trust center).

5 Confyde AI, release notes & status pages (Scenario Planning Jul 15 2025; Enrollment Forecasting Sep 1 2025).

6 PharmStars, Spring 2026 accelerator cohort announcement (LinkedIn); pharmstars.com program pages.

7 Confyde AI, homepage (500K+ trials corpus; ~30% time savings; site-selection timeline) — company-stated.

8 Epistemix, homepage & Populus documentation, epistemix.com & docs.epistemix.com (1:1 US synthetic population).

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13 OmniScience, Vivo product pages & FAQ, omniscience.bio ("control tower"; Connect / Ask / Monitor / Act; RBAC, blinding-aware, audit trails).

14 OmniScience named live deployments — INmune Bio global Phase 2 Alzheimer's trial (Business Wire, Dec 4, 2024) & BridgeBio pediatric achondroplasia Phase 3 open-label extension (SCOPE 2026 co-presentation; omniscience.bio/news-insights).

15 PR Newswire, "LabConnect and OmniScience to deliver first agentic AI solution for real-time clinical trial lab insights" (Sep 15, 2025).

16 OmniScience, "Named a Vendor to Watch in the inaugural IDC MarketScape on AI in clinical trials" (Oct 2025); IDC doc US53704325.

17 OmniScience news pages — "Accepted into Johnson & Johnson JLABS" (Apr 2025); TransCelerate Solution Collaboration Forum (May 2026).

18 OmniScience, FAQ / site metrics (6–8 wk go-live; 25% faster DB lock; 60–70% fewer manual tasks; 50+ organizations) — company-stated.

19 Double Blind Bio, homepage & /company, doubleblindbio.co (DeBBy agent; two-sided site & sponsor workflows; team pedigree).

20 CRIO Partners Program directory, clinicalresearch.io — Double Blind Bio listed under Site Enablement.

21 Define Ventures portfolio page; Tracxn / PitchBook profiles ($7M+ raised, Dec 2025; Define Ventures, SignalFire, Peterson).

Disclosure: Companies featured in this issue 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 as of the latest publicly known data and may change as vendors ship or reposition capabilities. Epistemix's trial-design placement reflects an Avery & Riley frontier read of its simulation capability. This is not a ranking and not a buying recommendation.