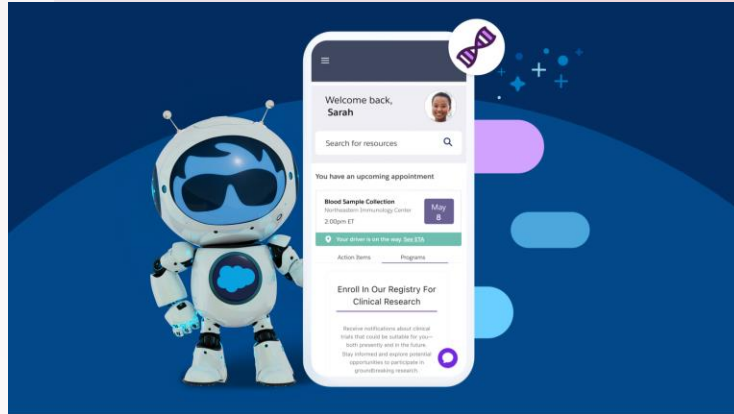


Praval's Clinical Trail Accelerator with Salesforce Life Sciences Cloud

Automating Clinical Trial Operations and Patient Engagement

Presented By,
Salesforce Practice:



Agenda

- Clinical Trial Enrolment & Eligibility Accelerator
- Business Challenge & Solution
- Business Process Flow
- Demo
- Key Use cases with Solution components
- Workflow scheme
- Benefits with Praval value add

Clinical Trial Enrollment & Eligibility Accelerator

- 1** | **Digitizes participant prescreening and eligibility evaluation** through online forms and automated workflows, reducing screening cycles from **5–7 days to 24 Hours** while ensuring consistent eligibility decisions.
- 2** | **Orchestrates consent, pre-health checkups, and clinical visits** by enabling coordinators to manage digital consent, appointment scheduling, and role-based notifications, while lab assistants capture structured clinical observations directly in Salesforce.
- 3** | **Accelerates eligibility approvals with AI and Slack integration**, using Agentforce-powered insights for eligibility explanations, automated cooling-period guidance, and **Slack-based manager approvals** for faster, compliant decision-making.

“This accelerator enables faster clinical trial enrollment, improved operational visibility, stronger compliance, and a seamless participant experience on Salesforce Life Sciences Cloud.”

Case study – Accelerating Clinical Trial Operations with Salesforce Life Sciences Cloud and Agentforce

Problem Statement:

Life sciences organizations are now facing challenges in managing Phase II clinical trials such as **GLUCO-CARE-02** due to manual and fragmented prescreening, consent, and eligibility processes. These gaps lead to **5–7 days screening cycles**, inconsistent assessments, and limited real-time visibility for coordinators and lab teams. As a result, **30–40% of enrollments are delayed**, increasing administrative effort, compliance risk, and impacting trial timelines and participant experience.

Solution: Streamlined Phase II clinical trial operations using **Salesforce** by digitizing participant prescreening, consent management, and eligibility evaluation. Reduced screening cycle time, improved assessment consistency, and enabled real-time visibility for coordinators and lab teams through automated workflows, **Slack-based approvals**, and **Agentforce-powered AI**, delivering faster enrollments, lower administrative effort, and improved participant experience.

10k+
Participants
Screened

3x

Faster
Screening
Cycle

↓ 60%

Manual
Effort

↑ 25%

Enrollment
Efficiency



50%↑

Life Science &
Experience Cloud



30%↑

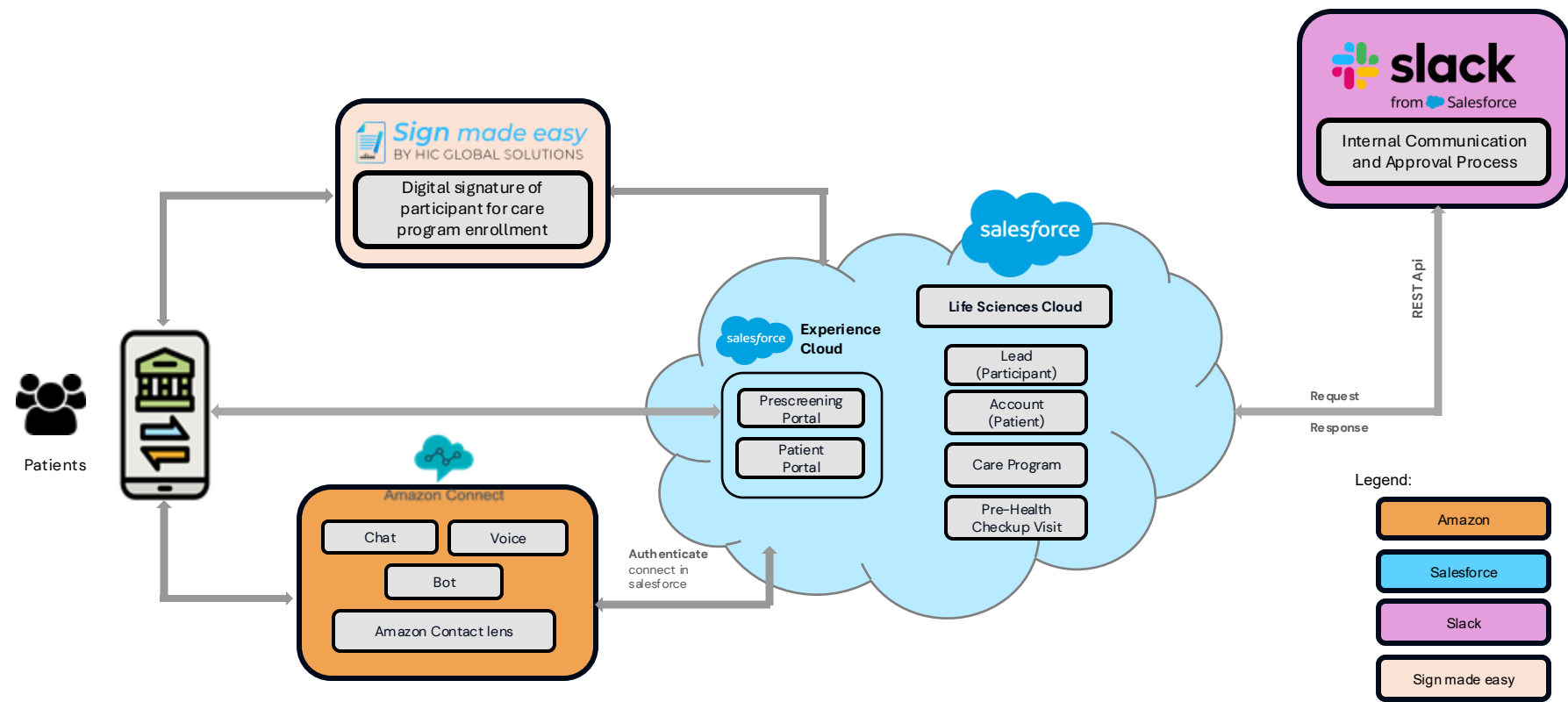
Digital agent for Care
Coordinators and Lab Assistants



20%↑

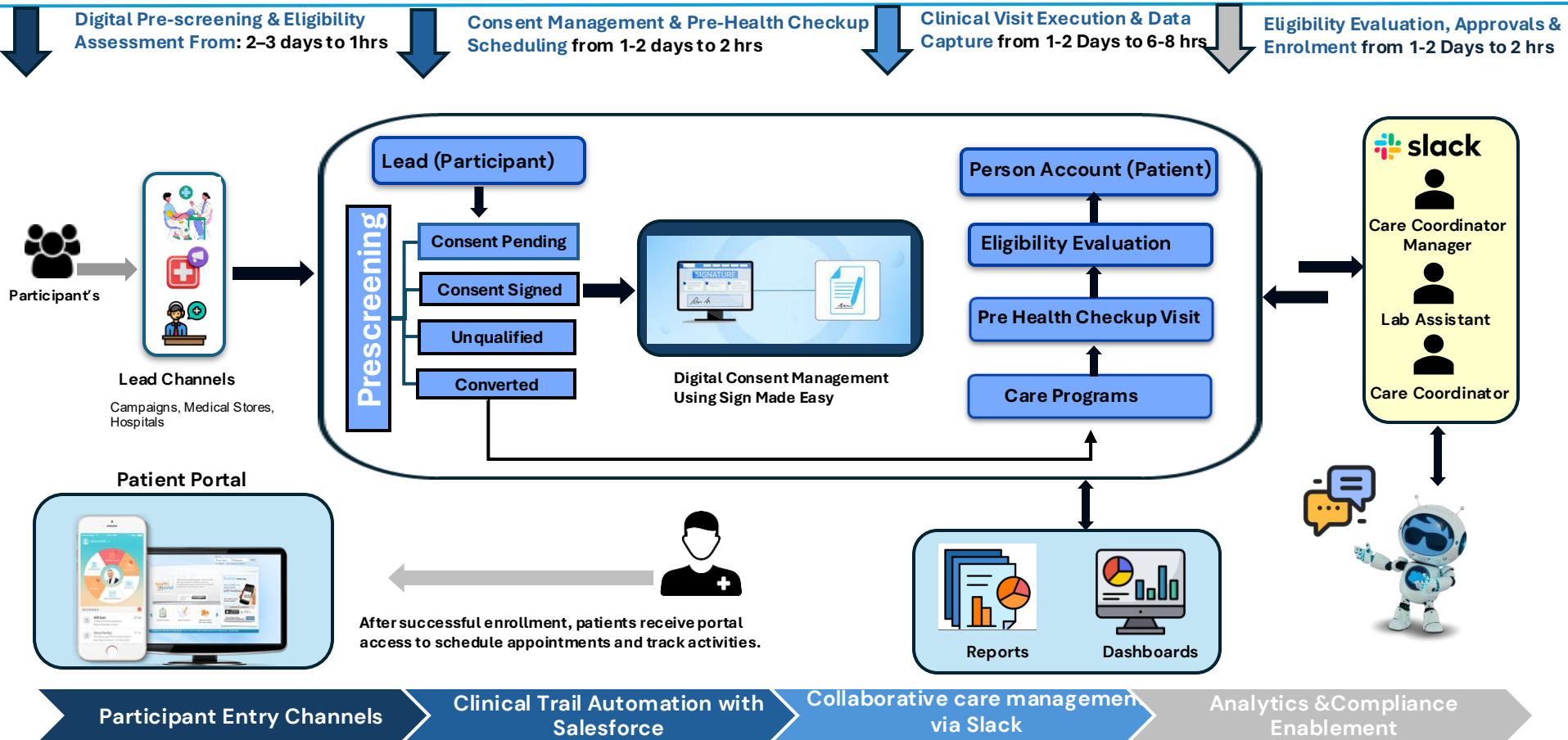
Slack and Digital Sign
Made Easy Integration

SYSTEM FLOW



- Customer can raise Address change request via multiple channels
- Logs the conversation
- Convert the speech to text
- Customer Sentiment analysis

Business Process Flow – “Accelerated Clinical Trial Prescreening & Enrollment System”



DEMO

Key Use cases



Digital Prescreening and Eligibility Automation: Enables participants to complete online prescreening with automated eligibility determination, significantly reducing manual intervention and screening timelines.



Consent and Pre-Health Checkup Orchestration: Provides coordinators with centralized management of digital consent, pre-health checkup scheduling, and automated, role-based notifications.



Clinical Visit Execution and Structured Data Capture: Allows lab assistants to conduct clinical assessments and capture standardized observations directly within Salesforce, ensuring data accuracy and traceability.



Automated Eligibility Evaluation and Slack-Based Approvals: Delivers system-driven eligibility scoring with AI-assisted insights and streamlined managerial approvals through Slack integration.



AI-Enabled Trial Operations (Agentforce): Leverages conversational AI to support coordinators, lab teams, and participants with eligibility explanations, guided workflows, and appointment coordination.

Solution Components

Digital Prescreening & Participant Onboarding

Mobile-optimized prescreening forms enable participants to complete eligibility screening in under 10 minutes via campaign or medical store links, eliminating manual and paper-based processes.

Eligibility Evaluation & Approval Automation

Rule-based eligibility checks automatically assess clinical criteria and trigger approvals for borderline cases, reducing screening cycles from days to minutes.

Consent, Scheduling & Clinical Workflow Automation

End-to-end automation for digital consent, pre-health checkup scheduling, lab notifications, and coordinator tasks powered by Salesforce Flow.

Agentforce AI for Clinical Trial Operations

AI-powered agents assist coordinators and lab staff with eligibility explanations, guided clinical workflows, and conversational appointment management.

Praval Tech Value:

Business Benefit	Out of the box	Praval value add
Reduction in participant screening cycle from 5–7 days to <24 hours	Standard lead capture and manual eligibility review using Life Science Cloud and objects	Built an intelligent eligibility evaluation engine with rule-based scoring, automated approvals, and real-time status updates, reducing screening time by 70% 1
Trial enrollment efficiency increased up to 40%	Basic portal-based data capture and manual follow-ups by coordinators	Implemented digital prescreening, consent automation, and appointment orchestration, accelerating lead-to-patient conversion and improving enrollment by 40% 2
Reduction in coordinator & lab assistant workload by 60% with eligibility accuracy up to 95%	Manual consent tracking, visit scheduling, and clinical data validation	Designed automated workflows with Agentforce guidance, task orchestration, and structured clinical visit capture, reducing operational workload by 60% and improving accuracy to 95% 3
Improved participant experience by 30% & compliance readiness by 50%	Fragmented participant communication and document management 4	Delivered a secure participant portal with real-time status visibility, audit-ready consent storage, and AI-driven explanations, improving experience by 30% and compliance readiness by 50%

Future deployment planning

Product Name	Functionalit
WhatsApp Business API	Send alerts to customers for warranty expiry, claim updates
Field Service Lightning	Mobile agent management, on-site service scheduling and dispatch
Agentforce	Delivers smart prompt recommendations, guiding customers through claims and inquiries

Our Customers



HARVARD
Web Publishing



QIA
QATAR INVESTMENT AUTHORITY

AstraZeneca



[e]enphase
ENERGY

TruMark
Financial
Credit Union



DIGITAL REALTY



UNIVERSITY OF
MONTANA

SAS



softwareONE



United
Educators

Beyond Bank
AUSTRALIA



UPC
INSURANCE



MOSSADAMS



CLAY LACY
AVIATION



EATING
RECOVERY CENTER

PARSONS
BEHLE &
LATIMER

A Professional
Law Corporation

McLEOD
LAW LLP





Thank You!



APPENDIX