Portfolio360 – "It All Started with a Spreadsheet"

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Background

Prior State

- Scattered, disconnected, and sometimes unavailable access to manage trial portfolios and clinical trials operation.
- Hours spent each month for Managers to pull, splice together data in Excel, and then review data.

Now

- A unified dashboard (built in PowerBI) that provides one stop shop for screening, consenting, accrual, financial, and scientific impact data for each disease program.
- Overall Trial Portfolio metrics available on demand for Senior Leadership as well.

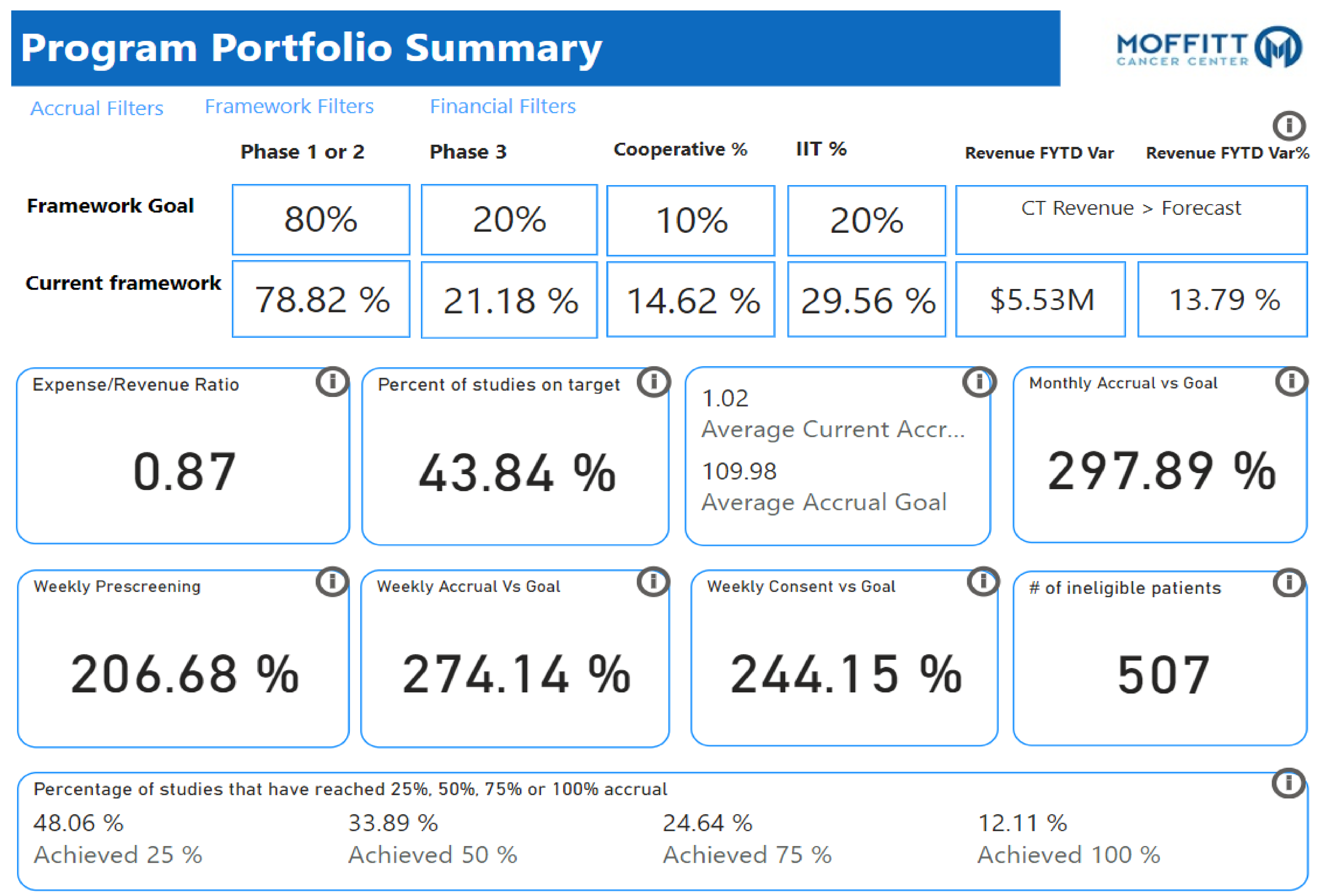
Goals

- Build a single dashboard to measure daily Key Performance Indicators (KPIs) (accrual, financials, scientific impact)
- Provide visibility to leadership, Principal Investigators and CRMDs at any given time.
- Align KPIs and tracking of institutional/CCSG goals.

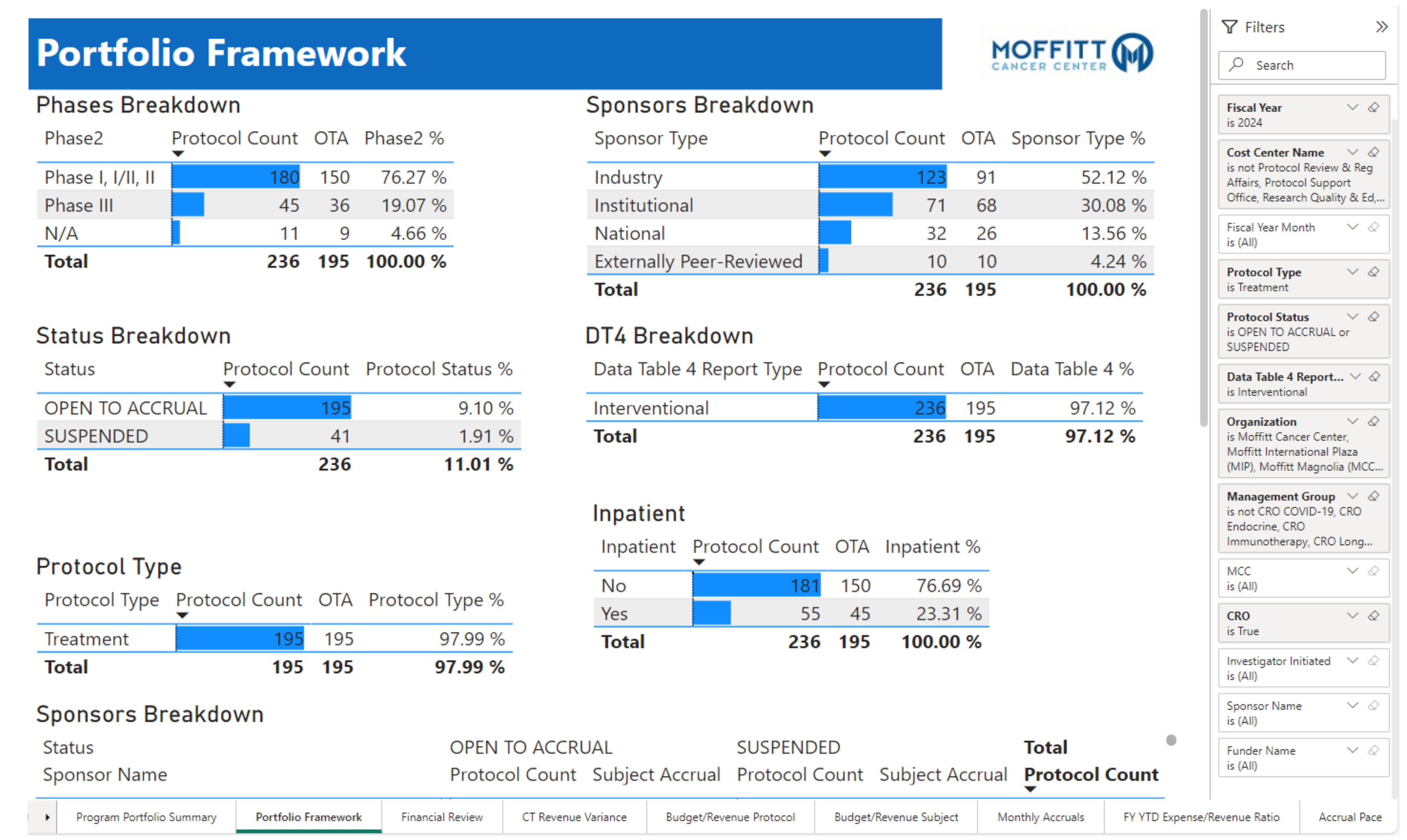
Portfolio360 in Review

Clinical Trials Revenue

Management Group		FYTD Revenue	Revenue Month Forecast	FYTD Forecast	Revenue FYTD Var	Revenue FYTD Var%
CRO	[redacted]	$3,889,987.37	364,101.92	$3,276,917.28	$613,070.09	18.71 %
CRO		$3,141,712.93	361,028.27	$3,249,254.43	($107,541.50)	-3.31 %
CRO		$5,890,590.65	347,954.01	$3,131,586.09	$2,759,004.56	88.10 %
CRO		$2,304,223.82	332,961.55	$2,996,653.95	($692,430.13)	-23.11 %



MCC	Accrual Variance	Screen Failure Rate	Open To Accrual Date	First Enrollment Date	OTA To First Enrollment Days	Accrual within 60 days	Date 25 %	Date 50 %	Date 75 %	Date 100 %
20752	1.58	11.11 %	8/23/2021	2022-02-25	186		2022-07-23	2023-06-23	2024-05-22	2025-04-22
20963	10.36	42.86 %	12/15/2021	2022-03-01	76		2023-03-16	2024-06-14	2025-09-13	2026-12-14
21247	-2.38	50.00 %	3/31/2023	2023-09-14	167		2023-09-29	2024-03-30	2024-09-28	2025-03-30



Solutions and Methods

- Reports now synched in One Dashboard.
- Filters allow for review by Fiscal Year (FY) or calendar year, along with numerous filters for deeper drill down and analysis.

Refinements and Next Steps

- Portfolio360 is continuously validated to ensure accurate data reported.
- Refinements made as identified by CRMDs and Administrative Leaders.
- Currently accessing Moffit's data warehouse as source and bringing in data from systems beyond our CTMS.
- Finding new ways to share best practices in the use of the tool.