

Guide to the Retention Toolkit

The Retention Toolkit

The Retention Tool is a suite of ready-to-use, customizable and patient-friendly tools to Engage and motivate participants from enrollment through study completion. Below is a list of all the resources, their intended purpose and audience.

Retention Plan

A customizable plan to organize your retention strategy and the materials

Facilitate Participation Ease and simplify participation and minimize early study withdrawals		
Tool	Purpose	Audience
Study Participant Introduction Letter/Email Template	To inform study participants about the resources available to them throughout the study	Participants
Calendar of Activities Template	To explain what to expect at each study visit	Participants
Calendar of Activities Sample	To reference for content and style guidance when creating a calendar of activities	Study team
Appointment Card Template	To remind participants of their next study visit	Participants
Trial Team Bio Sheet Template	To familiarize participants with the study team	Participants
Study Wallet Card Template	To convey study drug information to healthcare providers in case of medical emergency	Participants Healthcare providers
Physician Notification Letter Template	To inform a physician about their patient's participation in a study	Healthcare providers

Communicate and Appreciate

Report study progress and express appreciation for participation

Tool	Purpose	Audience
Study Participant Newsletter Template	To communicate study progress and thank participants for their time and commitment	Participants
Site Staff Newsletter Template	To communicate study progress, share reminders, acknowledge and appreciate site staff for their time and effort	Study team
Guide to Organizing a Recruitment/Retention Webinar	To provide instructions and best practices for organizing a webinar for study participants	Study team
Webinar Slide Deck Template	To share study progress/milestones with participants on a webinar	Participants Referring physicians
Study Satisfaction Survey	To assess participants' experience in the study and minimize risk of premature withdrawals	Participants
Participation Complete Letter/Email Template	To thank participants for completing the study and provide information on how to learn about study results	Participants
Birthday Card Template	To send best wishes to a study participant on their special day	Participants
Study Participant Thank You Card Template	To thank participants for their time and commitment	Participants
Study Coordinator Thank You Card Template	To acknowledge the work and effort of site coordinators	Study team
Study Investigator Thank You Card Template	To acknowledge the role and responsibilities of site investigators	Study team
Referring Physician Thank You Card Template	To thank physicians for patient referrals	Referring physicians
Tokens of Thanks Schedule Template	To preview the thank you items that participants will receive upon completing certain study visits	Participants

Tokens of Thanks Schedule Sample	To reference for content and style guidance when creating a tokens of thanks schedule	Study team
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Share Study Results Provide study findings to sites, participants and referring physicians		
Tool	Purpose	Audience
Study Results to Site Staff Letter/Email Template	To share study results with site staff including instructions on how to inform participants	Study team
Study Results to Participants Letter/Email Template	To share study results with participants	Participants
Study Results to Referring Physicians Letter/Email Template	To share study results with a referring physician	Referring physicians
Study Participant Newsletter Template	To communicate study progress and thank participants for their time and commitment	Participants
Site Staff Newsletter Template	To communicate study progress, share reminders, acknowledge and appreciate site staff for their time and effort	Study team
Guide to Organizing a Recruitment/Retention Webinar	To provide instructions and best practices for organizing a webinar for study participants	Study team
Webinar Slide Deck Template	To share study progress/milestones with participants on a webinar	Participants
Guide to Creating a Study Website	To provide instructions and best practices for designing a lay-friendly study website	Study team
Study Website Sample	To reference for content and style tips when creating a study website	Study team