TRIAL ATLAS

Decentralized Clinical Trials, Simplified.

Led by experienced entrepreneurs passionate about modernizing Clinical Research

Matt Ross
(Co-Founder, CEO)
Harvard MBA
Sanofi Genzyme Oncology
Philips Precision Diagnosis
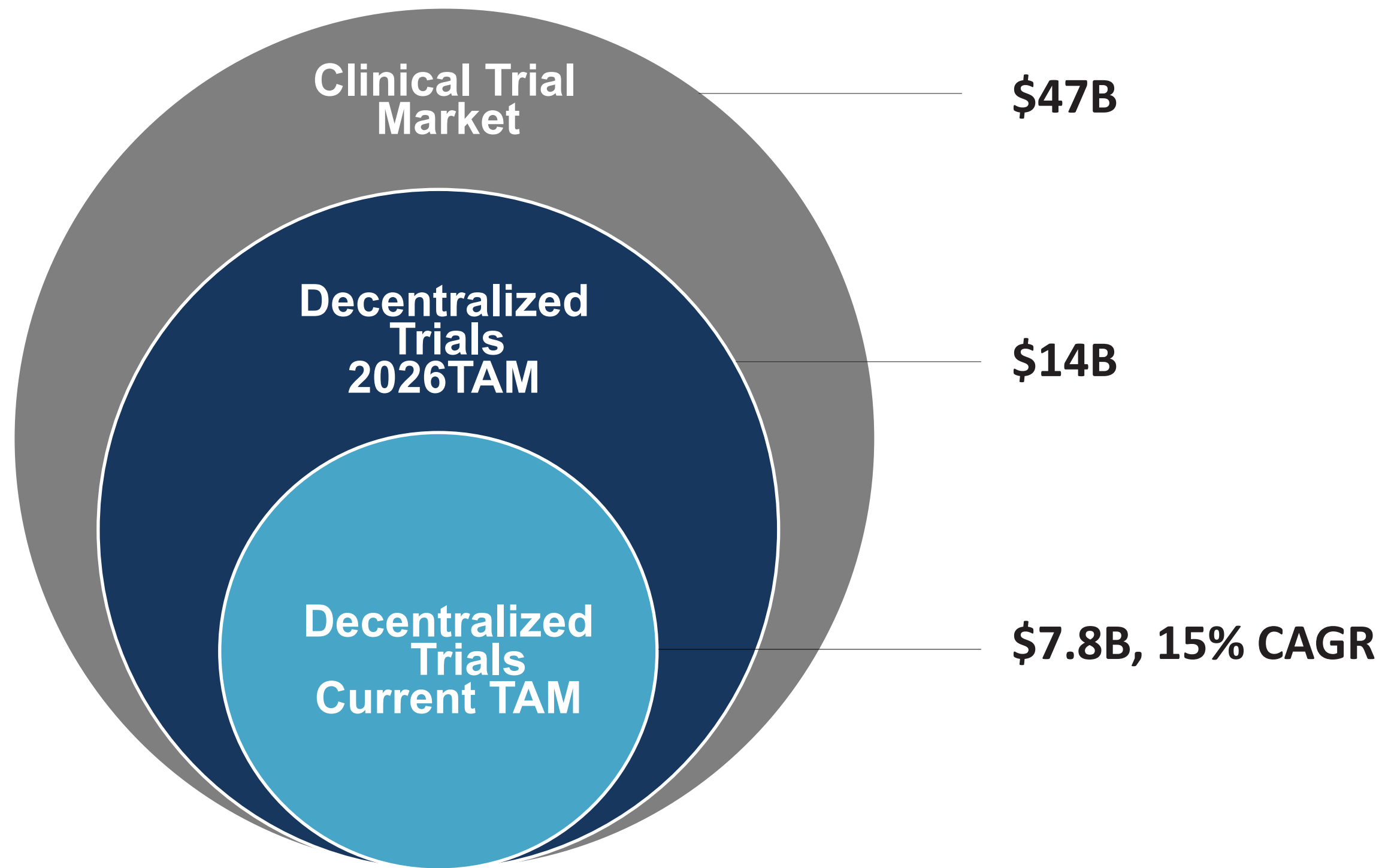Exited YC HealthTech Startup (Medumo)

Satish Tadikonda
(Co-Founder, Executive Chairman)
HBS Faculty
Managing Partner, Avigo Solutions
Board Member, Blue Cloud Ventures
Exited Serial Entrepreneur

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Tremendous Market Opportunity

Our Customers: Trial Sponsors and Administrators (Pharma, Biotech, CROs, Health Systems)

Clinical Trial Market — $47B

Decentralized Trials 2026TAM — $14B

Decentralized Trials Current TAM — $7.8B, 15% CAGR
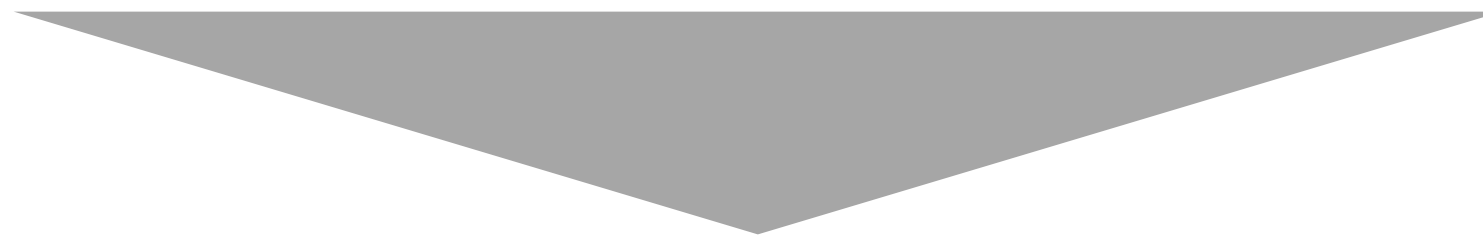
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Decentralization is the New Normal in Clinical Trials

70% of eligible patients live >2 hours away from trial sites

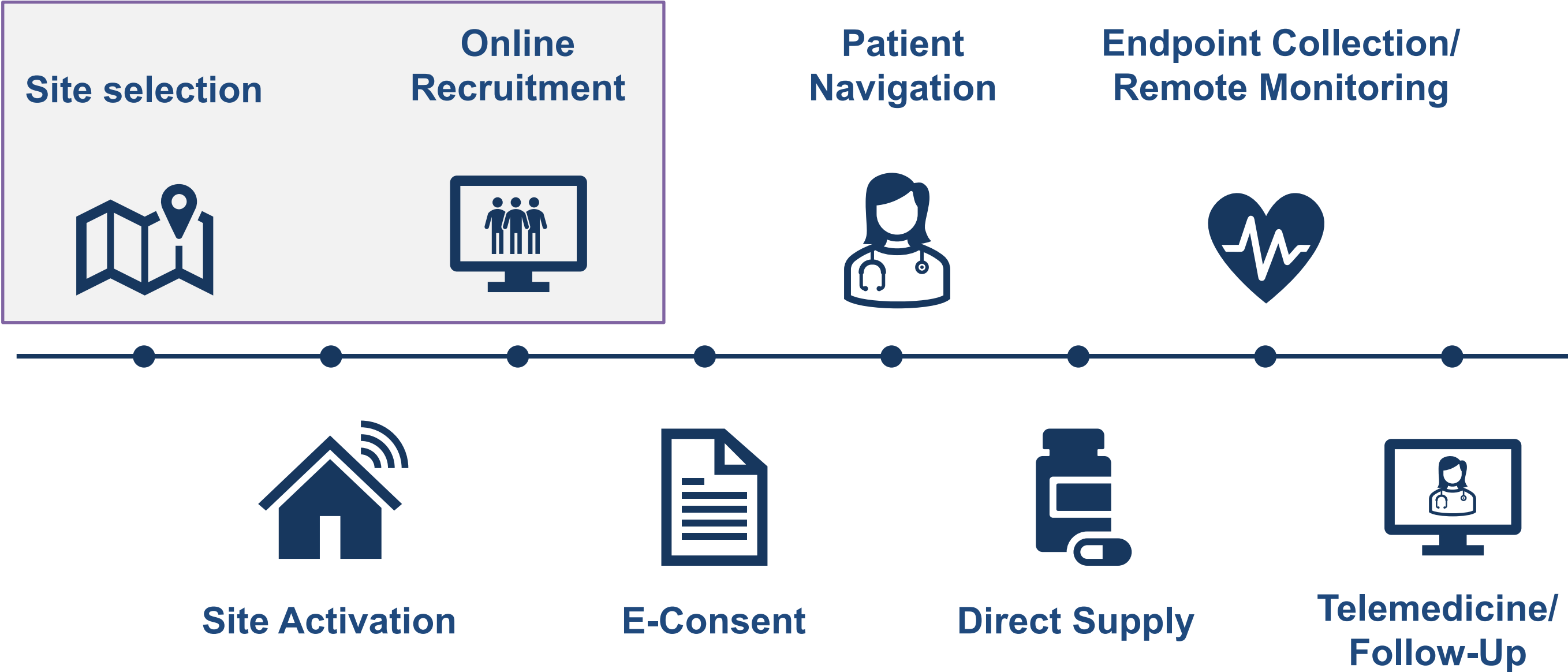**COVID Reduced access to trial sites by 80% during peak**

98% of patients and 70% of HCPs are satisfied with remote interactions

80% of new trials have some degree of decentralization (quadrupled from 20% pre-COVID)

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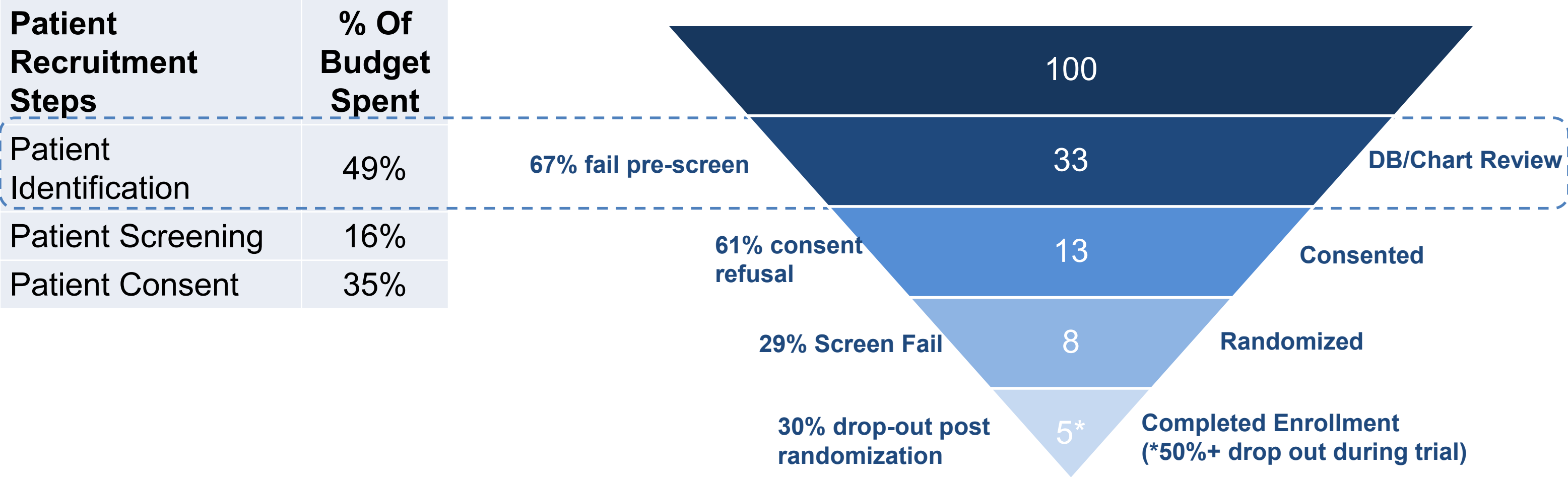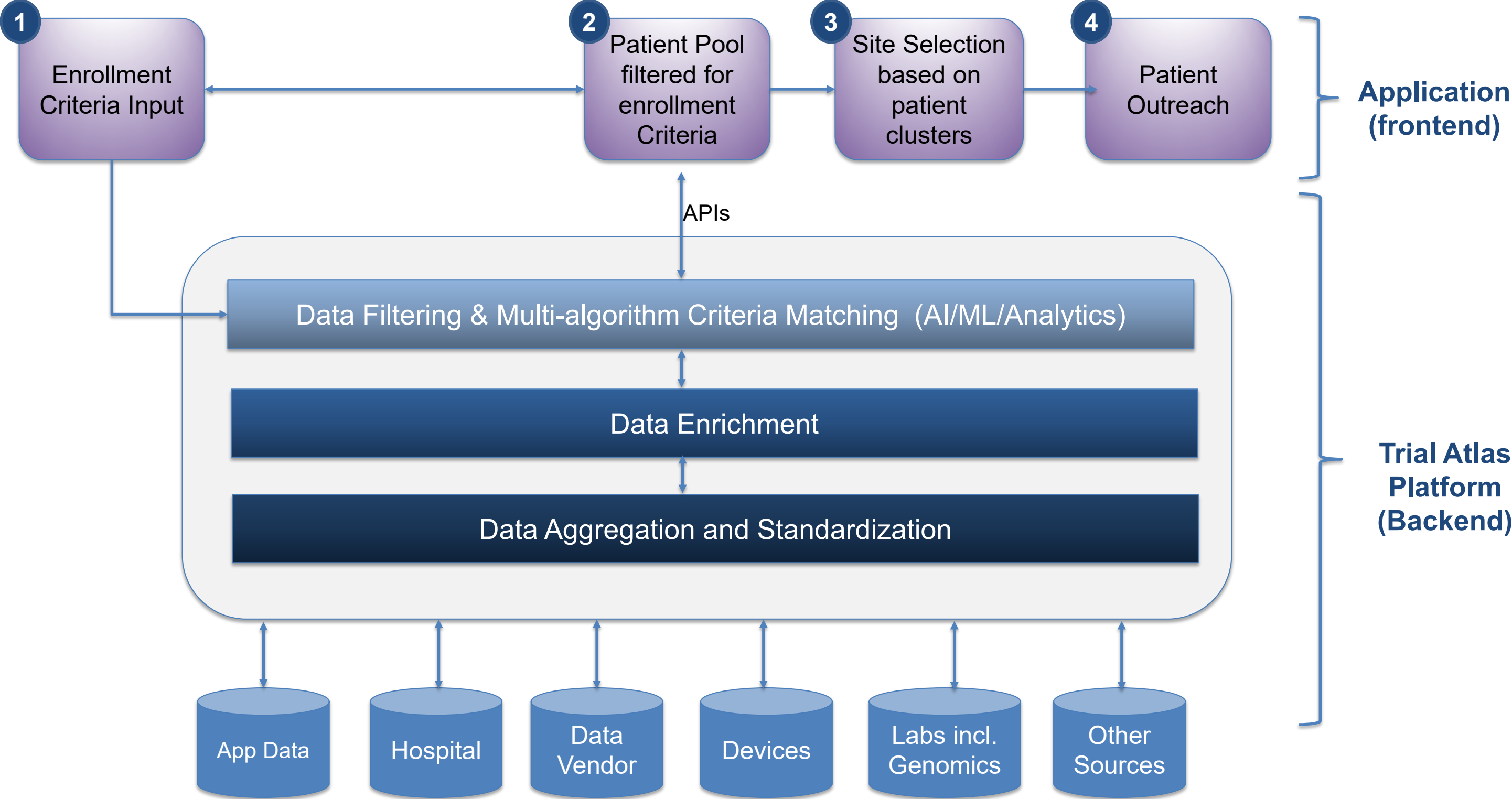# Trial Atlas: End-to-end Decentralized Trial (DCT) Solution

Focus of MVP

Site selection

Online Recruitment

Patient Navigation

Endpoint Collection/ Remote Monitoring

Site Activation

E-Consent

Direct Supply

Telemedicine/ Follow-Up

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Patient Identification is the costliest step in recruitment

Patient Recruitment Steps	% Of Budget Spent
Patient Identification	49%
Patient Screening	16%
Patient Consent	35%

100

67% fail pre-screen — 33 — DB/Chart Review

61% consent refusal — 13 — Consented

29% Screen Fail — 8 — Randomized

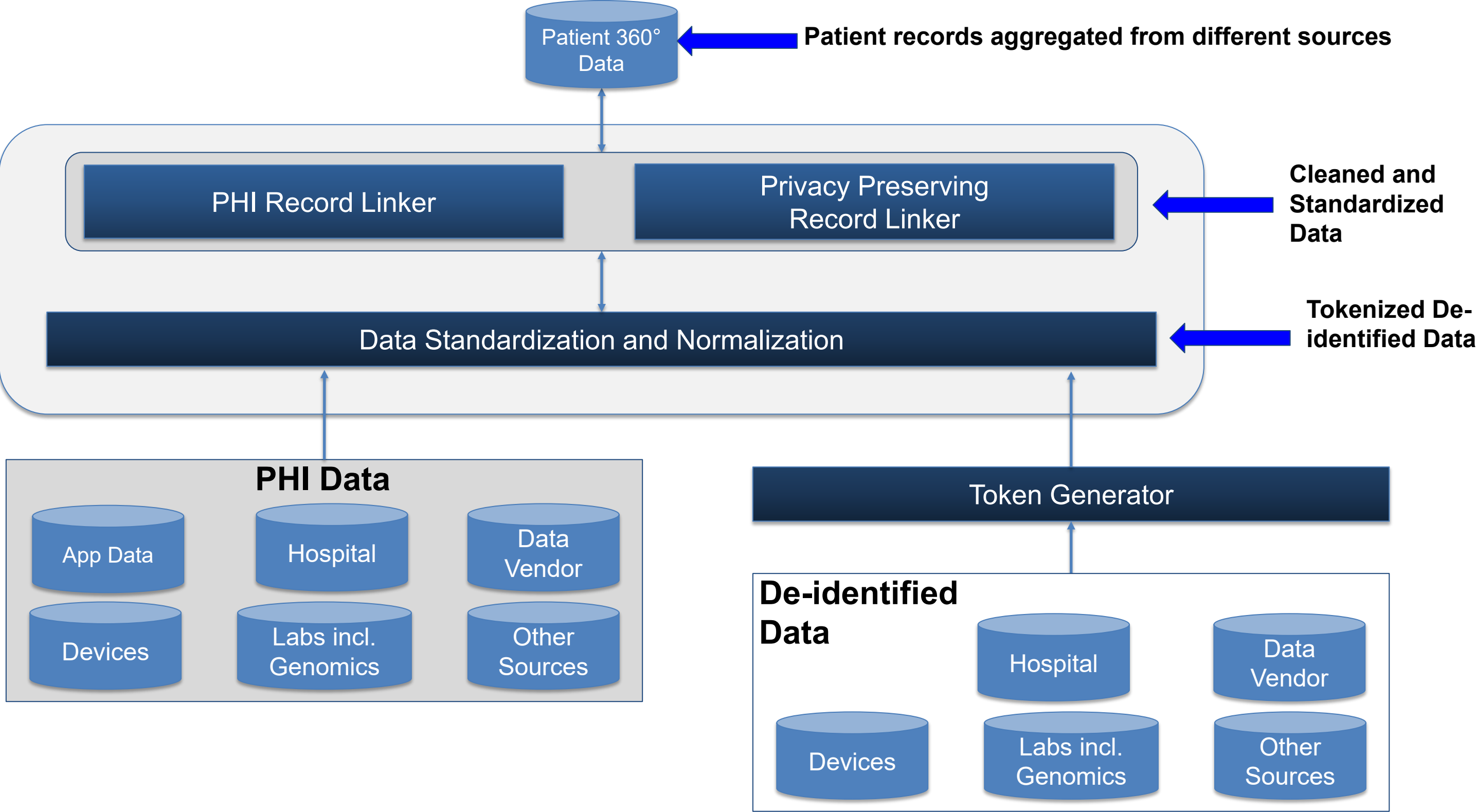30% drop-out post randomization — 5* — Completed Enrollment (*50%+ drop out during trial)

Trial sponsors must reach out to thousands of patients via advertising and referral networks to land ~100 interested patients, of which <50 will enroll

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Our Patient Recruitment MVP: Conceptual Overview

1 Enrollment Criteria Input

2 Patient Pool filtered for enrollment Criteria

3 Site Selection based on patient clusters

4 Patient Outreach

Application (frontend)

APIs

Data Filtering & Multi-algorithm Criteria Matching (AI/ML/Analytics)

Data Enrichment

Data Aggregation and Standardization

Trial Atlas Platform (Backend)

App Data

Hospital

Data Vendor

Devices

Labs incl. Genomics

Other Sources

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MVP Conceptual Overview Continued

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Pursuing an Asset Light strategy to win fast

As-a-Service only

eCRO

Science 37
THREAD™ Lightship
Curebase

DCT SaaS

Medable
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Tech-Enabled Biotech

TrialSpark

DCT Data Provider (RWE, etc.)

flatiron.

Asset development (data, therapeutics)

Tech-enabled site admin

Software only
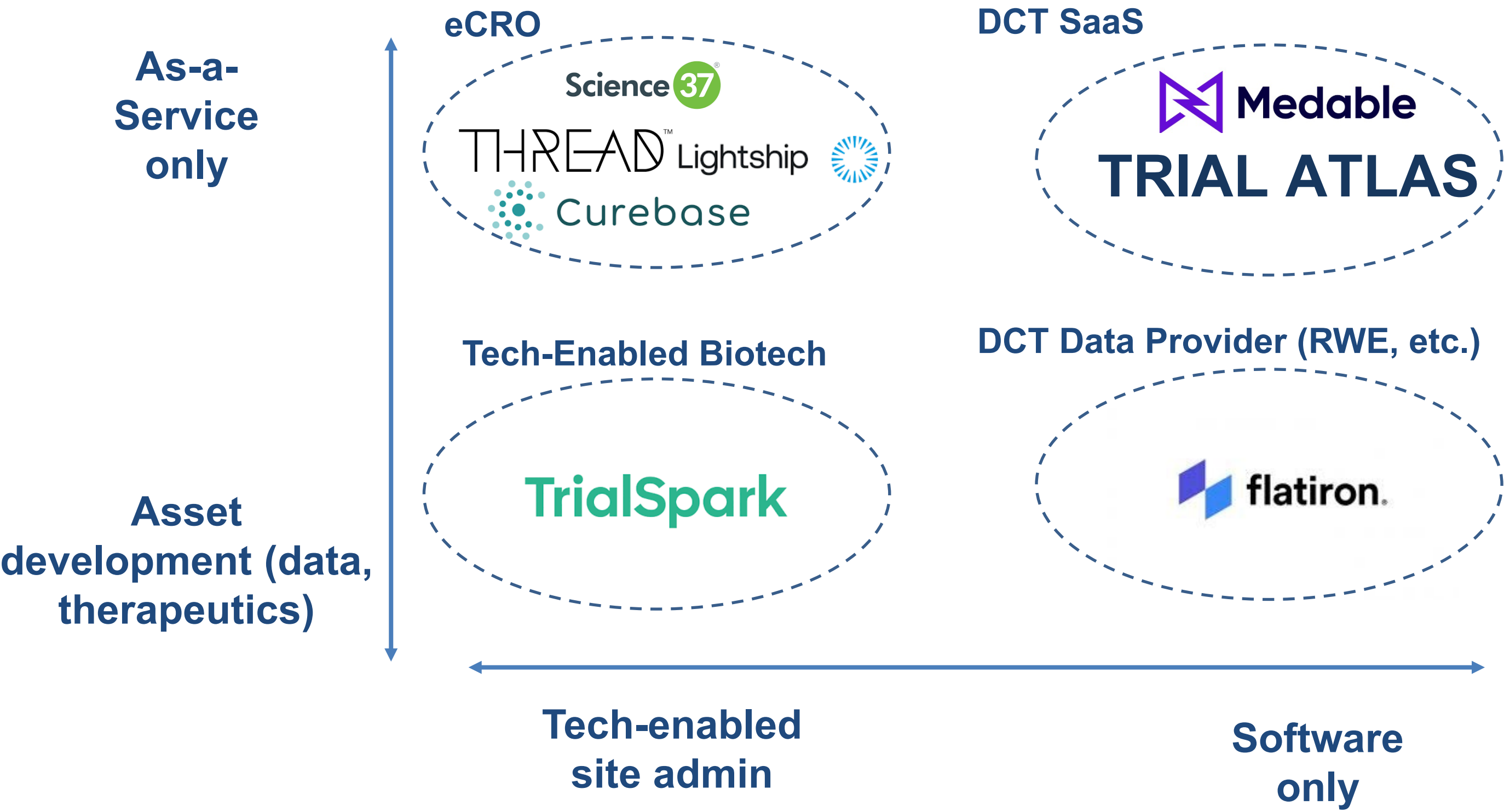
Differentiation vs. Existing DCT SaaS Providers

	Trial Atlas	Existing SaaS Providers (e.g. Medable)
For Trial Sponsors/Admins		
End-to-End (from site selection through FDA approval)	✓	✓
Pure SaaS (configurable, easy adoption)	✓	✓
Full ownership of Patient Selection, Recruitment, Outreach	✓	✗
Designed and built for protocols of difficult-to-recruit specialties (rare disease, pediatrics)	✓	✗
For Patients		
Data Access via Portal	✓	✗
New Trial Discovery via Portal	✓	✗