

# CEO CFO



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**CEOCFO Magazine - The Most Powerful Name In Corporate News and Information**

With over 30 Years of Experience in Direct Mail and Marketing, Clinical List America is one of the leading Patient Recruitment and Retention Companies for Clinical Trials

**Healthcare  
Clinical Trials**

**Clinical List America  
P.O. Box 6331  
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**Walter Kohn  
CEO**

#### **BIO:**

Walter Kohn is president and owner of Clinical List America, a patient recruiting and retention firm for clinical trials nationwide. As president, he is responsible for business planning and development. Walter also directs the company's technology and service development initiatives.

Clinical List America implements primarily direct mail for recruiting and e-communications for patient retention. As part of their recruitment strategy, Clinical List America maintains a nationwide, proprietary medical database that is verified as 100 percent HIPAA compliant.

In addition to Clinical List America, Walter also owns Spectra Communications, an integrated media company located in Columbia, S.C. Prior to Spectra, Walter served as general manager and sales direct for Kohn PrintGroup for more than 22 years. Both companies have led the industry in their respective market area with innovative mailing, fulfillment and marketing programs. By implementing the services offered by Spectra, Walter and the Clinical List America team are able to provide customized, turn-key services to Clinical List America's clients nationwide.

In his spare time, Walter enjoys boating, fishing, golfing and camping with his two sons, Chandler and Lennox and his stepson, Alex. He is married to Nancy Bolick Kohn, who is the promotional/tradeshows products manager for Spectra.

If you would like to contact Walter, he can be reached at [Info@ClinicalListAmerica.com](mailto:Info@ClinicalListAmerica.com) or (803) 530-3896.

#### **About Clinical List America:**

If you are interested in the very best that patient recruitment services and retention can offer, then look no further than Clinical List America! No matter how small or unique the niche is for which you are seeking patients, you can rest assured we will find exactly what you need within the time frame you specify. We are able to offer Sites, CROs and Sponsors the most targeted patient recruitment services and retention available because that is all we do!

**Interview conducted by:  
Lynn Fosse, Senior Editor  
CEOCFO Magazine**

**CEOCFO:** Mr. Kohn, what is Clinical List America?

**Mr. Kohn:** Clinical List America is a patient recruiting and retention firm for clinical trials nationwide.

**CEOCFO:** Who is using your services today?

**Mr. Kohn:** Clinical sites, clinical research organizations and sponsors are using our services today.

**CEOCFO:** Is there a particular subset or types diseases or testing that you focus on or is it across the board?

**Mr. Kohn:** Primarily, it is across the board. There are some indications that we do not typically recruit for (i.e. more life threatening disease where patients are typically referred by their doctors, like cancer.) More common indications we recruit for include: chronic ailments such as diabetes, rheumatoid arthritis, many women's ailments, migraine, heart disease, depression and many more.

**CEOCFO:** What are some of the challenges today and what have you figured out that allows you to do a better job?

**Mr. Kohn:** That is a good question. The biggest challenges we face today are the HIPAA guidelines that impose stringent methods to recruit. We are limited in our recruiting efforts because we simply cannot go directly to an individual and say that we know you have a certain disease. HIPAA guidelines will not allow us to do that, so all of our participants are opt-in participants. These participants fill out survey, which include a health section. In order for us to collect any health information about potential participants, a person must check an opt-in box, indicate that they are 18 years of age or older and sign the survey. If they do not do fulfill all three of these requirements, we do not pull any health information from them. Therefore, our biggest challenge is maintaining HIPAA guidelines while effectively recruiting the potential participant.

**CEOCFO:** How do you overcome that?

**Mr. Kohn:** To overcome this obstacle, we make sure that our lists are as up-to-date as possible (to ensure that our recruiting strategies are reaching a highly targeted audience). In addition to maintain 100 percent HIPAA compliancy, we also refresh our data lists once a month with additions or deletions (i.e. additional potential participants who have opted-in or removal of those who are deceased). At the time of mailing, we also run each data list through a USPS move update. This provides updated addresses from people who have filed new addresses with their local post office. Finally, we make sure that all of our data is less than two years old.

**CEO CFO:** Your website indicates that direct mail is your main method. Is that typical of how recruiters work?

**Mr. Kohn:** Direct mail is one, very important channel that has been used for more than twenty years in the industry. If implemented properly, direct mail is highly effective. When a direct mail piece is sent to a highly targeted audience with the right message, the recipients are more likely to respond. When a potential participant opens their mailbox and sees that a clinical trial, which may help them, a family member or friend, they are likely to respond. Besides direct mail, there are also additional channels, including social media and online marketing, which are also implemented by Clinical List America.

**CEO CFO:** Why are people still responding to direct mail?

**Mr. Kohn:** People are still responding to direct mail because our clients are not trying to sell them something. We are appealing to people who are sick or have some kind of chronic disorder. These people, for the most part, are looking for help. Our direct mail pieces are not whimsical or cartoonish; they are very serious. The photographs, diagrams and message on our direct mail pieces are very effective

and sobering for those who suffer from the indicated ailment. To assist our clients, Clinical List America has developed six tips for better patient recruitment via direct mail.

**CEO CFO:** When someone expresses an interest does that go then directly to your client, what is your role?

**Mr. Kohn:** Spectra Communications, my marketing, print and fulfillment company, has developed a process called Dynamic Response, and Clinical List takes advantage of this direct mail response mechanism. With this service, we print our Business Reply Mail (BRM) permit on the reply card of our direct mail pieces. This way,

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potential participant replies come back to Clinical List America. Once Clinical List America receives the replies, we then electronically transfer the data to our client's site(s). This service is available to our clients for an additional fee. The value of this service is to relieve the site of having to open the responses and build a database of respondents.

**CEO CFO:** On your site you have your direct mail fees front and center. I do not see that often; why this approach?

**Mr. Kohn:** Over the past four or five years, companies conducting clinical trials have tightened their budgets. Due to these restraints on budget, we want our clients and prospects to

know upfront exactly what our costs are. We do not want it to be ambiguous, and we feel our margins are fair. Our financial model of success depends on volume, and we have many customers nationwide. In a business like recruiting, we understand that many of our clients and prospects are not marketing pros, nor do they have experience with buying print or implementing social media/online recruiting. This is not their expertise. Often, these people are not familiar with the costs involved in patient recruiting. They just know that they have to recruit a certain number of qualified patients with a specified indication. In an industry that is increasingly cost conscious, our clients and prospects need to know what things cost quickly, and they need to recruit quickly and effectively through various channels. Therefore, we have our costs upfront; providing our clients with the leisure of not wasting time checking on pricing.

**CEO CFO:** Your company has been a vendor with Clinical List America and then you took it over about a year ago. Why did you make that decision?

**Mr. Kohn:** I have been in the direct mail and marketing business for more than thirty years. The previous owners of Clinical List America (formerly City List), were my customers when they decided to retire. Recognizing my experience and available resources, the previous owners and I agreed that this new venture would be a good fit for me. I am always looking to diversify my portfolio financially, and I have always been very interested, and have done a lot work, in the medical industry for years. Understanding the importance of clinical trials for their contributions to the betterment of medicine and peoples' health, I was interested in this side of the business, and I am happy to say that we have broken new ground. We have improved the look and feel of the company, changed how we market our sales,

products and service and increased our business.

**CEO CFO:** How do you reach potential customers?

**Mr. Kohn:** We implement several tactics to reach potential customers. These strategies include: The “old-fashioned” way of picking up the phone and introducing ourselves to prospective clients. We ask if these people know anything about Clinical List America – about half do, the other half do not. Depending on the circumstances, we explain who we are, what services we can offer and/or ask how we can be of assistance to that potential prospect. We do a massive amount of marketing. Our marketing initiatives include electronic communication, including a monthly e-newsletter to our current clients and prospects; social media and online marketing (i.e. company blog, social media pages – Facebook/Twitter/Google+); reaching out to prospects via LinkedIn; distribution of print and promotional collateral and participating/exhibiting in nationwide/global conferences and exhibitions. Within the past few months, we have participated in an Association of Clinical Research Professional (ACRP) regional exhibit in Richmond, V.A., we exhibited in the 2013 ACRP Global Conference and Exhibition (which draws more than 2,000 attendees and more than 100 exhibitors) in Orlando, F.L. and are planning to exhibit at the 2013 Site Solutions Summit at Amelia

Island, F.L. in October 2013. Our team also has memberships with clinical research professional organizations like ACRP and Site Solutions.

**CEO CFO:** Does it tend to be a universal ‘aha’ moment when prospective clients ‘get’ it or is it case by case?

**Mr. Kohn:** To leave a client unmentioned, our largest client ‘gets’ it as much as anybody I have ever known. Not only does he ‘get it,’ but he takes advantage of every technology initiative that Clinical List America has to offer. I have to respect their communications. For example, he utilizes e-publishing, which brings publications online and creates online publications enriched with interactive video and audio content, to help recruit and retain potential clinical trial participants. That is the ‘aha’ moment, and when they ‘get it’, they really ‘get it’ and they know how to utilize our services. Direct mail is not our only channel, but the challenge lies in making prospects understand the value of our other services.

**CEO CFO:** Why should the business and investment community pay attention to Clinical List America and what makes you an exceptional?

**Mr. Kohn:** One of the things that make us exceptional is that we have, in our estimation, perfected direct mail for patient recruitment in clinical trials. With more than 30 years of ex-

perience in direct mail and marketing, we feel we are the best. My staff and I have been doing this for years, and we feel our concierge service is second to none. We are probably one of the fastest in America when it comes to direct mail recruiting, and many of our customers would attest to that. Secondly, our team consists of a highly talented, diverse group of individuals, including previous pharmaceutical executives, print industry experts, marketing MMCs and award-winning designers, all of whom allow Clinical List America to provide its clients with the best services available in patient recruitment and retention.

**CEO CFO:** Final thoughts?

**Mr. Kohn:** I would say that one of the reasons we have become more successful and have increased our position in the market is because of our service response. Many of our clients have, in fact, commented on the quick response and exceptional service. We are very humble and understand that we are in the business to help people get well. When not limited geographically, we like to sit down, face-to-face with our clients to understand exactly what their needs are and what their greatest obstacles are. We have become a better company because we have integrated ourselves with the clients.



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