TrialsNest

CASE STUDY

Three-Study Site Recruitment Workflow Case Study

Printable
SEO resource

A case-study worksheet for replacing spreadsheet recruiting with structured intake and reporting.

How to use this worksheet

Bring this into a vendor demo, sponsor-site meeting, or internal workflow review. Check what is true today, circle weak spots, and use the score boxes to decide what needs attention first.

01 Before workflow

Risk

- [ ] List where patient interest arrives: web forms, phone calls, referrals, campaigns, or partner sources.
- [ ] Identify where ownership gets unclear across the three studies.
- [ ] Name the spreadsheet, inbox, or manual report step that creates the most repeated work.

Notes

Use this space for vendor questions, site blockers, or sponsor follow-up.

02 After workflow

Change

- ☐ Each inquiry has study, source, owner, status, prescreen progress, blocker, and next action.
- ☐ Patients can be separated into first outreach, records needed, review-ready, scheduling-ready, stale, and closed.
- ☐ Coordinators can work by exception instead of rereading every row.

03 Proof points

Evidence

- ☐ Measure time to first action, stale-lead count, records blockers, scheduled visits, and sponsor report prep time.
- ☐ Compare source quality by movement instead of lead volume alone.
- ☐ Use the case study to decide whether software improves both the daily queue and the sponsor update.

Notes

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