

Enterprise Clinical Trial Recruitment Software RFP Questions

A printable RFP worksheet for sponsors, CROs, site networks, and research operations leaders.

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 Workflow and implementation

Ask

- How are studies configured, sources tracked, leads assigned, and next actions enforced across sites or studies?
- What does the first 30-day launch look like for one study and one coordinator team?
- How does the platform support prescreen review, records readiness, scheduling movement, and close reasons?

Notes

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

02 Reporting and visibility

[Ask](#)

- Can sponsor reports show movement since the last update, source quality, site blockers, scheduled visits, and owners?
- How are sponsor-facing views separated from coordinator workspaces and patient-level operational detail?
- Can reports explain why recruitment is stalled instead of only showing counts?

03 Trust and technical boundary

[Ask](#)

- How are roles, access, public study pages, protected workspaces, and sensitive data boundaries separated?
- What audit, privacy, consent, and data-handling controls are available for healthcare recruiting workflows?
- What integrations or export paths exist for CTMS, sponsor reporting, or site operations without forcing PHI into the public frontend?

Notes

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