

Site Network Recruitment Maturity Model

A printable maturity scorecard for shared statuses, local ownership, stale controls, source quality, dashboards, and sponsor 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 Level 1 to 2: standardize

Current

- Move from site-by-site spreadsheets and inboxes to shared statuses, source labels, close reasons, stale thresholds, and records-readiness terms.
- Confirm every site uses the same definition for new, contacted, prescreening, records needed, scheduling-ready, stale, and closed.
- Identify which definitions are still unclear.

Notes

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

02 Level 3: manage

Gap

- Every active lead should have site, study, source, owner, status, blocker, last movement date, and next action.
- Stale leads, missing records, and source-quality patterns should be visible before sponsor meetings.
- Network leaders should be able to support local teams without taking ownership away from them.

03 Level 4: optimize

Next

- Sponsor reports come from the live workflow and explain movement, blockers, source quality, scheduled visits, and next actions.
- Dashboards help the network decide what changes next week.
- Use the maturity score to prioritize implementation and RFP questions.

Notes

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