TrialsNest

REPORTING TEMPLATE

Sponsor Recruitment Reporting Template

Printable
SEO resource

A weekly enrollment update structure for sponsors, CROs, site networks, and study 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 Movement since last update

Update period

- [ ] New inquiries, contacted patients, completed prescreens, likely-fit patients, records-ready patients, scheduled screening visits, completed visits, and closed patients.
- [ ] Plain-language readout: what improved, what slowed, and what changed since the previous report?
- [ ] Key movement to discuss in the next sponsor-site meeting.

Notes

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

02 Source quality

Source decision

- [ ] For each source, capture new leads, contacted rate, prescreen completion, broad fit, scheduled visits, stale leads, and common close reasons.
- [ ] Recommendation: continue investment, revise targeting, rewrite patient-facing language, or adjust follow-up cadence.
- [ ] Separate acquisition volume from site execution and protocol friction.

03 Site blockers and next actions

Owner and date

- [ ] Summarize time to first follow-up, coordinator capacity, pending reviews, missing records, scheduling constraints, no-response patterns, and criteria questions.
- [ ] Close with owner, decision needed, next action, and date for review.
- [ ] Start the next update by checking whether those actions moved the pipeline.

Notes

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