

# Three-Study Site Recruitment Workflow Case Study

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.

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## 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.

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