TrialsNest

RFP LIBRARY

Clinical Trial Recruitment Software RFP Library

Printable
Workflow guide

A printable RFP library for workflow coverage, multi-site visibility, source quality, reporting, implementation, access, and trust boundaries.

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 questions

Ask

- [ ] How does the platform capture inquiry source, study interest, owner, status, blocker, prescreen progress, records readiness, and next action?
- [ ] Show a coordinator working new, records-needed, scheduling-ready, stale, and closed leads in one queue.
- [ ] Explain how final study decisions remain with authorized teams.

Notes

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

02 Multi-site and reporting questions

Ask

- [ ] Show multi-site dashboard views for source quality, stale risk, records blockers, scheduled movement, and site-level next actions.
- [ ] Show a sponsor update produced from daily workflow activity.
- [ ] Explain what stays in the site workspace and what appears in sponsor reporting.

03 Implementation and trust questions

Ask

- [ ] Describe the first 30 days: statuses, coordinator training, spreadsheet retirement, first report, and support model.
- [ ] Explain role-based access, audit history, patient-facing language, consent handling, exports, and integration boundaries.
- [ ] Confirm public frontend pages do not become a PHI-processing backend.

Notes

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