

# Clinical Trial Recruitment Software ROI Example

A printable worksheet for comparing software value against manual recruitment tracking.

## 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 Current manual effort

Hours/week

- Estimate hours spent cleaning form exports, checking inboxes, reviewing duplicate leads, and rebuilding status from spreadsheets.
- List recurring manual steps for intake, prescreen review, records requests, scheduling handoffs, and sponsor reporting.
- Name the highest-friction step that would free coordinator time if it were easier to see.

### Notes

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

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## 02 Recovered movement

Impact

- Estimate how many stale leads could be recovered with clearer owner, blocker, status, and next-action visibility.
- Separate reviewable patients from raw leads so ROI reflects useful movement, not only volume.
- Track source quality with prescreen completion, contact rate, scheduled visits, and close reasons.

## 03 Reporting and decision value

Confidence

- Estimate time saved when sponsor updates come from daily workflow movement instead of manual report prep.
- Identify decisions the report should support: source mix, site support, criteria questions, or scheduling capacity.
- Use conservative assumptions. The best ROI case is credible because it explains work saved and decisions improved.

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