

# Sponsor Recruitment Reporting Template

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.

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## 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.

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