recruit crm

A-Z clinical trial recruitment strategy

Step 1: Prepare for the study and assess feasibility

- [ ] **Review the protocol thoroughly:** study objectives, inclusion/exclusion criteria, and visit schedules.
- [ ] **Assess geographic reach:** identify local patient pools, travel constraints, and the potential for remote/virtual participation.
- [ ] **Estimate timeline and recruitment targets:** include a buffer for dropouts and estimate the duration of each phase (screening, enrollment).
- [ ] **Allocate recruitment budget:** factor in sourcing, outreach, compensation, participant support, and tech/tools.
- [ ] **Assess feasibility:** identify potential challenges based on patient population, inclusion/exclusion criteria, and logistical issues.

Step 2: Create sourcing & outreach plan

- [ ] **List sourcing methods: include** healthcare referrals, digital outreach, patient registries, advocacy groups, and previous trial contacts.
- [ ] **Map channels to target demographics:** identify the best methods for reaching patients based on condition, age, geography, etc.
- [ ] **Create outreach materials:** develop clear messaging, eligibility summaries, consent information, and contact details.
- [ ] **Set up tracking and follow-up plan:** define how to manage responses (initial interest → screening → consent → enrollment).
- [ ] **Plan for digital ads if applicable:** prepare and schedule targeted ads (social media, search engines, etc.).

Step 3: Curate screening & eligibility workflow

- [ ] **Prepare pre-screening tools:** design eligibility questionnaires, use digital triage or AI-powered tools if available.
- [ ] **Create a checklist for required documentation:** medical history, tests, consent forms, and baseline data.

- [ ] **Define screening process:** assign roles for reviewing eligibility (recruiter or clinical site), and set timelines for confirmation.
- [ ] **Ensure informed consent process:** ensure participants are well-informed and answer any questions about the study.

Step 4: Increase participant engagement & take consent

- [ ] **Create easy-to-read consent documents:** use plain language and make the document accessible to all participants.
- [ ] **Set expectations with participants:** clearly outline the number of visits, remote vs onsite options, compensation, and contact details.
- [ ] **Use a communication plan for reminders and follow-ups:** set automated reminders for screening, consent signing, and visits.
- [ ] **Allocate recruitment budget:** factor in sourcing, outreach, compensation, participant support, and tech/tools.
- [ ] **Offer participant support:** assist with travel, transport, and any other logistical concerns to minimize dropouts.

Step 5: Enroll & handoff to site staff

- [ ] **Confirm all documentation is complete:** ensure all consent forms, medical records, and screening data are submitted.
- [ ] **Provide participant summary to site staff:** include all relevant contact information, schedules, and participant requirements.
- [ ] **Ensure smooth communication hand-off:** pass participant information to site staff with any updates or concerns.
- [ ] **Confirm participant readiness:** make sure the participant is fully briefed on the study timeline, expectations, and follow-up steps.

Step 6: Monitor the process and track metrics

- [ ] **Maintain a real-time dashboard** to track key metrics:
  - [ ] Leads generated per channel
  - [ ] Screened vs eligible ratio
  - [ ] Conversion rate (interest → screening → enrollment)
  - [ ] Drop-out rate
  - [ ] Time-to-enroll (first contact to enrollment)
  - [ ] Demographics to ensure diversity/representation
- [ ] **Ensure smooth communication hand-off:** pass participant information to site staff with any updates or concerns.

- [ ] **Track communication success:** monitor follow-up success and participant engagement.
- [ ] **Ensure informed consent process:** ensure participants are well-informed and answer any questions about the study.

Step 7: Make contingency & backup plans

- [ ] **Identify backup sourcing channels:** if initial recruitment channels aren't effective, shift to secondary options (e.g., new digital ads, advocacy group partnerships).
- [ ] **Ensure flexibility in participation:** consider offering remote options, flexible hours, or transport assistance.
- [ ] **Prepare for logistical issues:** such as location or scheduling conflicts. Have contingency options in place.
- [ ] **Maintain participant support resources :** be ready to offer transport or assist with any enrollment questions.

Step 8: Take follow-up after enrollment & provide retention support

- [ ] **Create a follow-up schedule:** set reminders for visits, ongoing engagement, and check-ins with participants.
- [ ] **Provide participant support:** confirm transportation, address concerns, and offer any needed resources.
- [ ] **Ensure all data is documented:** review the study's data integrity and keep up-to-date participant records.
- [ ] **Implement a feedback loop:** ask participants for their input on their experience to improve future recruitment and retention efforts.