

Research Site Key Performance Indicators Toolkit

Key Performance Indicators (KPIs) give clinical research sites the visibility they need to manage performance, forecast growth, and communicate value to Sponsors and CROs. By tracking consistent metrics across the operational lifecycle—from feasibility to finances—sites can better demonstrate reliability, predictability, and efficiency. Sponsors benefit from understanding these KPIs because they reflect a site's true capacity, performance consistency, and ability to execute within timelines. *See Appendix A for definitions.*

Human Resources

Human Resources KPIs highlight the staffing stability, capability, and readiness required to execute studies effectively. These measures help Sponsors and CROs assess whether the site's workforce can support enrollment, data entry, monitoring, and patient care without disruption.

Priority Metrics			
# FTE (full time equivalent) employees	Turnover Metrics	Training (ex: GCP, IATA & Expiration Dates)	
Additional Metrics			
Time to Hire	# of Applicants	Time to Interview	Time to Onboard
NPS - Net Promoter Score			
Workload	CRC / Studies	CRC / Patients	CRC / Visits
Revenue per CRC			
CRC Pay Ranges			

Business Development

Business Development KPIs show how efficiently a site responds to feasibility requests, secures new awards, and expands sponsor relationships. They also reveal strategic positioning—such as pipeline diversity, aging feasibility follow-up, and client concentration—allowing Sponsors to gauge the site’s scalability and long-term partnership potential.

Priority Metrics					
# of Feasibilities	Turnaround Time	Response Rates	Non Awards	Site Declines	Study Cancellations
# PSVs/SQVs					
# Awards	By Unique Study		By Contract (Site Network)		
Additional Metrics					
CDA Timelines					
BD & Contract Timelines					
Pipeline	Therapeutic Area	Sponsor - Lead		CRO - Lead	
Aging Feasibilities	Priority - Follow Up				
Client Concentration	Diversify - Goal				
New Clients	Targets - Goal				
Projections vs. Reality					

Recruitment & Retention

Recruitment and retention KPIs demonstrate a site's ability to identify, screen, randomize, and retain participants through study completion. These metrics—such as screen failure rate, drop rate, enrollment pace, source ROI, and funnel conversion—directly predict a site's expected enrollment performance and overall study success.

Priority Metrics					
Outcomes	# Screened	# Randomized		Screen Failure %	
Drop Rate	LTFU	# Discontinued	# Withdrew	% Completed	
% Enrollment Goal					
Additional Metrics					
Enrollment Rate	Patients/Month		Enrollment Months		
Lead to Enrollment Rate					
Enrollment Source	Database	Advertisement	ROI	Lifetime Value - LTV	
Funnel Conversion	# Leads	# Calls/Outreach	# Consented	# Screened	# Enrolled
AD Response Rate	AD:Lead		Lead:Touchpoint		
Feasibility Predictions to Total Enrolled					
Representation - Diversified					
Projections vs. Reality					

Operations

Operational KPIs assess protocol compliance, quality execution, audit outcomes, and visit volume—all indicators of operational maturity. They help Sponsors and CROs understand how reliably a site follows study timelines, manages safety, controls deviations, closes queries, handles inventory, and maintains pace between screenings.

Priority Metrics		
First Patient In (FPI) Post-Greenlight		
Protocol Deviations	Minor	Major
# Audits	Outcome (Findings) % of Successful Audits	
Visit Volume		
Additional Metrics		
Last Patient In - Enrollment Timeline		
Pace Ratio - Time Between Screenings		
Data Entry Timelines		
Query	Total	Timelines To Close
Inventory Management	Supplies - Lab Kits, IP, IPADs Related to Enrollment Goals	
Project Delivery Rate %	Track Progress - Red, Yellow, Green	
Time to End of Recruitment		

Financials

Financial KPIs offer insight into a site's fiscal health and billing efficiency, ensuring that the organization can sustain ongoing study operations. Metrics like P&L, EBITDA margin, average cost per visit, AR aging, and budget negotiation timelines assure professional financial management for a site's success and health.

Priority		
EBITDA Margin		
Profit & Loss - Expenses & Revenue		
Aging Accounts Receivable (AR)		
Pipeline Forecast		
Additional		
Revenue / CRC		
Revenue / Investigator		
Monthly Payment % - Negotiated		
Withholding % - Negotiated		
Average \$/Visit	TA	Sponsor
Budget Received/Negotiated Value		
Budget - Sponsor		
Timelines to Invoice - Milestones/Targeted Dates		

Together, these KPIs create a comprehensive picture of site performance, financial stability, and operational excellence. When sites track and share these metrics transparently, Sponsors / CROs gain confidence in forecasting and collaboration while sites strengthen their ability to negotiate resources, justify budgets, and advocate for sustainable study operations. Strong KPI management ultimately benefits the entire research ecosystem by accelerating timelines, improving quality, and advancing more equitable and successful clinical trials.

Appendix A: Acronyms & Key Performance Indicators

Acronyms

AD – Advertisement

AR – Accounts Receivable

BD – Business Development

CDA – Confidential Disclosure Agreement

CRC – Clinical Research Coordinator

CRO – Contract Research Organization

EBITDA – Earnings Before Interest, Taxes, Depreciation, and Amortization

FPI – First Patient In

FTE – Full-Time Equivalent

GCP – Good Clinical Practice

IATA – International Air Transport Association

IP – Investigational Product

KPI – Key Performance Indicator

LTFU – Lost to Follow-Up

LTV – Lifetime Value

NPS – Net Promoter Score

P&L – Profit and Loss

PSV – Pre-Study Visit

ROI – Return on Investment

SQV – Site Qualification Visit

Human Resources KPIs

FTE Count – Number of full-time equivalent employees supporting research operations.

Staff Turnover Rate – Percentage of staff leaving during a defined period.

Training Compliance – Available certifications without expiry (e.g., GCP, IATA).

Time to Hire – Time from job posting to offer acceptance.

Time to Interview – Time from application receipt to first interview.

Time to Onboard – Time from hire acceptance to operational readiness.

Number of Applicants – Volume of candidates per open position.

NPS (Net Promoter Score) – Measure of employee engagement or satisfaction.

CRC Workload (Studies / Patients / Visits) – Distribution of operational responsibilities per CRC.

Revenue per CRC – Total site revenue divided by number of CRCs.

CRC Pay Ranges – Compensation benchmarking for CRC roles.

Operations KPIs

FPI (First Patient In) – Time from greenlight to first enrollment.

Protocol Deviations (Minor / Major) – Frequency and severity of deviations.

Audit Outcomes – Findings and percentage of successful audits.

Visit Volume – Number of study visits conducted.

Last Patient In (LPI) – Completion of enrollment phase.

Pace Ratio – Time between screenings or enrollments.

Data Entry Timelines – Time from visit to data entry completion.

Query Volume & Closure Timelines – Number of queries and time to resolution.

Inventory Management – Oversight of lab kits, IP, devices, and supplies.

Project Delivery Rate (%) – Progress tracking using Red/Yellow/Green status.

Time to End of Recruitment – Duration from FPI to LPI.

Financial KPIs

EBITDA Margin (%) – Operational profitability indicator.

Profit & Loss (P&L) – Revenue and expense performance.

Aging AR – Outstanding receivables by age category.

Pipeline Forecast – Expected future revenue from active pipeline.

Revenue per CRC – Financial productivity per coordinator.

Revenue per Investigator – Financial productivity per investigator.

Monthly Payment Percentage (Negotiated) – Percentage monthly payment terms negotiated.

Withholding Percentage (Negotiated) – Withholding percentage payment terms negotiated.

Average Revenue per Visit – Mean value per completed visit.

Budget Received vs Negotiated – Variance from initial to final budget negotiated.

Sponsor Budget – Total sponsor-funded study budget.

Invoice Timelines – Time to invoice against defined milestones.

Appendix A: Key Performance Indicators

Business Development KPIs

Number of Feasibilities – Total feasibility requests received.

Feasibility Turnaround Time – Time to respond to feasibility requests.

Feasibility Response Rate – Percentage of feasibilities completed and returned.

Non-Awards – Feasibilities not resulting in awarded studies.

Site Declines – Studies declined by the site after feasibility review.

Study Cancellations – Awarded studies that do not proceed.

PSVs / SQVs Completed – Number of site qualification activities conducted.

Awards by Study – Number of awarded studies by unique protocol.

Awards by Contract (Site Network) – Number of awarded total contracts by site and/or site network.

CDA Timelines – Time to execute confidentiality agreements.

Budget & Contract Timelines – Time from budget & contract receipt to execution.

Pipeline by Therapeutic Area – Distribution of studies by indication.

Sponsor / CRO Lead Pipeline – Source of pipeline opportunities.

Aging Feasibilities – Feasibilities pending follow-up beyond defined thresholds.

Client Concentration – Revenue dependence on top sponsors/CROs.

New Client Targets – Goal for onboarding new sponsors or CROs.

Projections vs. Reality – Forecasted versus actual study awards.

Recruitment & Retention KPIs

Number Screened – Participants screened for eligibility.

Number Randomized – Participants randomized into the study.

Screen Failure Rate (%) – Percentage of screened participants not randomized.

Drop Rate – Participants discontinuing before study completion.

LTFU Rate – Participants lost to follow-up.

Withdrawn / Discontinued – Participants exiting voluntarily or per protocol.

Completion Rate (%) – Percentage completing the study.

Enrollment Goal Achievement (%) – Actual enrollment vs target.

Enrollment Rate (Patients/Month) – Speed of enrollment over time.

Enrollment Duration (Months) – Total enrollment period.

Lead-to-Enrollment Rate – Conversion from initial lead to enrolled participant.

Enrollment Source – Origin of enrolled participants (database, ads, referrals).

Advertisement ROI – Cost efficiency of recruitment advertising.

Lifetime Value (LTV) – Long-term value of recruitment channels.

Funnel Conversion Metrics – Progression from leads → calls → consent → screening → enrollment.

Ad Response Rate – Engagement rate from recruitment advertising.

Feasibility Prediction Accuracy – Forecasted vs actual enrollment.

Participant Representation (Diversity) – Demographic alignment with protocol goals.

Projections vs. Reality – Expected vs actual enrollment performance.