



## Patient Recruitment Toolkit

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### Contents

Patient Recruitment Strategy Checklist	1
Ideal Participant Persona Template	3
Habit Patient Recruitment Services	5

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# Patient Recruitment Strategy Checklist

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This checklist is based on the principles outlined in the Strategies for Patient Recruitment Seminar. This checklist will guide you through some basic steps to help you create a successful recruitment strategy.



## 1. Define your audience.

Use the persona template on pages 3-4 to define your target audience using questions like the ones below.

- Who are you trying to recruit (age, sex, location, etc.)?
- What are their pain points and frustrations? If they have a chronic condition, how is their daily life affected?
- What are their motivations? What might convince them to participate in your study?
- Where do they spend their time?

## 2. Craft your messaging.

You'll want to ensure that any language you use to speak to your audience resonates with them emotionally. Be sure to take into account any potential sensitivities that may exist. Be up front about what you're asking of them, and be even more clear about how they can get involved with a strong, clear call to action (e.g., "Apply to participate by calling us at XXX-XXXX").

## 3. Brainstorm ways to reach your audience.

Think about where your audience is most likely to be receptive to your message. If they're waiting in a clinic, are they open to reading a recruitment message or are they nervous because they're about to receive potentially upsetting news? You could consider using tactics like the ones below.

### **Online Advertising**

- Facebook
- Google
- Twitter
- Instagram
- LinkedIn

### **Traditional Advertising**

- LRT and transit ads
- Outdoor ads
- Trade magazines and publications
- Radio
- Television

### **Non-traditional Advertising**

- Environmental ads (elevator wraps, waiting room TV screens, roll-up banners, etc.)
- Social media posts and blog articles (organic content)
- Partnerships and media outreach
- Word of mouth

## □ 4. Create your recruitment tools.

After you've identified how to reach your audience, it's time to get your message out there. Identify which recruitment tools will be the best fit for your project and for your audience. Tools could include a website, brochures and posters, advertisements, or even pre-written articles and social posts to share with partner associations who can spread the message on your behalf.

## □ 5. Analyze and adjust.

You'll want to measure which tools and tactics are the most successful and which ones aren't working as planned. This will allow you to make adjustments to keep things running effectively and improve your efforts over time.

### **Make the most of your resources.**

If you aren't able to create the materials you need on your own, try using free tools like Canva and Picmonkey.



#### **Canva**

*Canva provides access to free stock photos, fonts, and drag and drop templates for everything from posters, to media kits, business cards and more.*

[canva.com](https://canva.com)



#### **Picmonkey**

*Picmonkey is a free online tool for photo editing and graphic design.*

[picmonkey.com](https://picmonkey.com)

You can always contact Habit to get research studies, health research surveys, and volunteer opportunities posted on the Be The Cure site and social media properties for free.

If you feel like you might need a little extra help creating marketing tools or a recruitment strategy, give us a shout!

#### **CONTACT**



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# Ideal Research Participant Persona Template



Defining your ideal research participant (or “persona”) will help you decide which marketing tactics to use and where to place them so that your audience will take notice. The example below will give you an idea of what type of information you’ll want to include. The second page contains a blank template that you can use for your research project. Depending on the scope of your project, you may find you need to create several different personas to capture the major types of participants.

## Example

### What is my persona’s demographic information?

<b>AGE</b>	18–30 years old
<b>SEX</b>	Female
<b>HEALTH</b>	<ul style="list-style-type: none"><li>• Type 1 diabetic for seven years</li><li>• Average BMI</li><li>• Active lifestyle</li><li>• Non-smoker</li></ul>
<b>OTHER</b>	Lives close to trial site

### What are my persona’s pain points?

<b>EMOTIONAL</b>	Mood swings due to varying blood sugar levels; anxiety about long-term health
<b>PHYSICAL</b>	Daily insulin shots, finger pricks to check blood sugar, loses sleep to low blood sugar

### Where does my persona go for general information (e.g., social media, newspaper, websites, etc.)?

<b>ONLINE</b>	<ul style="list-style-type: none"><li>• Google</li><li>• Facebook</li><li>• Instagram</li></ul>
<b>OFFLINE</b>	<ul style="list-style-type: none"><li>• Magazines (<i>Elle</i>, <i>Cosmopolitan</i>)</li><li>• Radio</li><li>• Outdoor/Transit (commutes to work daily)</li></ul>

### What are my persona’s hobbies and interests?

- Yoga
- Volunteers at local animal shelter

## Blank Template

**What is my persona's demographic information?**

AGE

SEX

HEALTH

OTHER

**What are my persona's pain points (e.g., insulin shots, anxiety, etc.)?**

EMOTIONAL

PHYSICAL

**Where does my persona go for general information (e.g., social media, newspaper, websites, etc.)?**

ONLINE

OFFLINE

**What are my persona's hobbies and interests?**

# Habit Patient Recruitment Services

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## Recruitment Audit

### We will...

- ✓ Ask questions about your research study, like inclusion and exclusion criteria, potential market size, statistics and data on what you're researching, and so on.
- ✓ Analyze your existing recruitment materials and identify opportunities for improvement.
- ✓ Meet with you to present our analysis.

### It'll cost...

 **\$3,600+GST**

## Recruitment Workshop + Recommendations

### We will...

- ✓ Sit down with you and your team for a half-day workshop to learn more about your research study and work with you to brainstorm potential avenues for improving recruitment.
- ✓ Independently research and analyze your existing recruitment strategy, then identify opportunities for improvement.
- ✓ Return for a second half-day workshop to present our recommendations, teach you how to implement them, and provide you with a summary report, tools, and guidelines.

### It'll cost...

 **\$8,400+GST**  **POPULAR CHOICE**

## Custom Recruitment Strategy

We'll meet with your team to determine your specific needs and craft a strategy to achieve your goals. We'll develop messaging, create recruitment tools, run an advertising campaign, and deliver performance reports, all based on what we've learned throughout our years of experience. We see ourselves as part of your team, and it's our job to help drive recruitment numbers.

### It'll cost...

We'll help you determine how much you need to spend to achieve your recruitment goals. The price varies depending on the number of sites and patients. Expect to spend anywhere from \$25,000 to \$125,000 or more, including your media investment.

 **\$25,000-\$125,000+**  **THE WHOLE ENCHILADA**