CRO Scoring Tool

I- Initial Preparation

- Before CRO proposals arrive, customize the EXCEL file to meet your needs regarding additional categories and perhaps consider including notes on cultural fit and other "soft" criteria.

- Brief your review team (if multiple people are scoring) on the evaluation categories and scoring criteria. This tool uses a scoring of 1 to 5.

II. Scoring Each Proposal

For each CRO:

Step 1:

Review the full proposal carefully, paying special attention to how they address each major category (Experience, Clinical Strategy, Operations, etc.).

Step 2:
For each evaluation category:
- Assign a score between 1 and 5:
    - 5 = Excellent (fully meets or exceeds expectations)
    - 4 = Very Good (meets expectations with minor gaps)
    - 3 = Good (adequate, but with noticeable gaps)
    - 2 = Fair (significant concerns)
    - 1 = Poor (does not meet requirements)

Step 3:
- Enter the score into the "Score (1-5)" this column is shaded in blue in the file.
- For each row in the worksheet, the score will calculate (Score × Weight (%)) to get the "Weighted Score" for that line item. The total score will fall between 1 to 5, with a score of 1 being the lowest, and 5 the highest

Step 4:
- Sum the weighted scores to get a Total Score for each CRO. The total score for each CRO will fall between 1 to 5, with a score of 1 being the lowest, and 5 the highest

III. Comparison Across CROs

- Compare Total Scores across all CROs.
- Review any especially high or low category scores to understand where key differences lie.
- Consider qualitative factors as well (gut feeling about cultural fit, enthusiasm, responsiveness).

IV. Recommendation Step

Use your findings to:

- **Shortlist:** Select top 2 CROs for final due diligence / presentations
- **Select:** Recommend a single CRO to move forward
- **Decline:** Politely decline CROs that don't meet minimum threshold

CRO Score Card

Category	Weight (%)	Score (1 - 5)	Weighted Score
Experience Specific to Product / Therapy			
Clinical Strategy and Protocol Development Experience			
Biostatistician & Statistical Analysis Plan Support			
Data Management Process and Technology			
Operational Execution - Defined QA and Project Management			
Clinical Trial Report Writing			
Budget and Financial Transparency			
Risk Mitigation and Risk Management Process			
Communication and Collaboration			
Total	**100%**		

Use the Score Column (highlighted in Blue) to enter your scores, the tool will automatically calculate weighted score for each line item and provide an overall Score for each CRO.