

# For clients

## 1. Consultant Matching

**Find the right expert for your research, fast.**

Whether you're launching a new study, developing a product, or need specialized scientific insight, Connect Research makes it easy to get started.

### **Step 1: Post Your Project**

Start by outlining your objectives, timeline, and key requirements. Or use our **AI-powered search** to describe what you're looking for—

*“I need a consultant for regulatory strategy for a phase II oncology trial.”*

You'll instantly get matched with consultants who specialize in your area.

### **Step 2: Choose How You Connect**

- **Browse & Invite** – Explore consultant profiles and reach out directly.
- **Receive Proposals** – Open your project to receive proposals and compare different approaches, timelines, and pricing.

### **Step 3: Confidentiality First**

Before discussing sensitive project details, both you and the consultant will be prompted to sign a **Non-Disclosure Agreement (NDA)**—choose our default template or upload your own. This step ensures your information stays protected.

### **Step 4: You're Covered by Our Platform-Wide Contract**

No need to draft custom contracts. All collaborations on Connect Research are governed by our **platform-wide Terms of Service and Policies**, which provide a clear and fair legal framework for both clients and consultants.

### **Step 5: Fund & Collaborate with Confidence**

Once you've agreed on project details, fund the project through our secure system. Your payment is held in **escrow** and only released when you mark the project as delivered.

### **Step 6: Use Your Dedicated Workspace**

Communicate, share files, and track milestones all in one centralized space—keeping your project organized and on track.

### **Step 7: Dispute? We've Got Your Back.**

Not satisfied with the outcome? Submit a **dispute**, and our team will work with both sides to help resolve the issue fairly and efficiently.

## 2. CRO Matching

Find the right Contract Research Organization (CRO) in minutes—no middleman needed.

**Step 1: Describe Your Project**

Tell us what type of research service you're looking for, including any location or specialization preferences. Just type something like "I need a CRO for preclinical safety studies in Canada."

**Step 2: Let Our AI Work for You**

Our system scans multiple external databases to match your criteria with CROs offering relevant services.

**Step 3: Get Your Personalized List**

Browse a curated list of CROs complete with summaries and direct links to their websites.

**Step 4: Connect & Kick Off**

Choose the CROs that suit your project and reach out directly to begin the conversation.

### **3. Online Seminars & Workshops**

Upskill your team or dive deeper into a subject with expert-led virtual sessions.

**Step 1: Submit Your Request**

Let us know your topic, training goals, preferred budget, and trainer location.

**Step 2: We Match You with a Specialist**

Our team selects the best-fit consultant(s) to lead your session(s).

**Step 3: Leave the Logistics to Us**

We schedule the session(s) and set it up via Zoom (or your preferred platform).

**Step 4: Join & Engage**

Attend a live, tailored session with interactive elements, Q&A, and practical insights.

### **4. Career Consultations**

Navigate your next career move with expert guidance.

**Step 1: Post a Career Consultation Request**

Create a project titled "Career Consultation" and describe what kind of guidance you're looking for (e.g., transitioning fields, interview prep, resume review).

**Step 2: Choose Your Consultant**

Use our AI to get matched or open the floor to receive proposals from consultants.

### **Step 3: Connect & Collaborate**

Select your consultant and work together in your dedicated workspace to achieve your career goals.

## **5. Industry Insights & Networking**

### **Stay informed. Stay connected.**

Explore our [blog page](#) for expert-written articles, trend reports, and research highlights. Engage with fellow professionals and thought leaders in your field.

## **For consultant**

### **1. Consultant Matching**

**Get matched with projects that align with your expertise.**

#### **Step 1: Create Your Profile**

Highlight your skills, experience, education, grants, awards and specialties so clients can easily find you through our AI search or by browsing consultant profiles.

#### **Step 2: Get Discovered**

- **AI Matching** – When a client describes their needs, our AI suggests the most relevant consultants—including you.
- **Open Projects** – Clients can post projects and invite consultants directly or open them to proposals.

#### **Step 3: Submit Proposals or Accept Invitations**

If a project is a fit, submit a tailored proposal with your approach, timeline, and pricing—or accept direct invitations and start the conversation.

#### **Step 4: Sign the NDA**

Before diving into project details, both you and the client will be prompted to sign a **Non-Disclosure Agreement (NDA)**—either our standard one or the client’s preferred version.

#### **Step 5: Work Under a Platform-Wide Contract**

No back-and-forth legal admin. All projects on Connect Research are covered by our **Terms of Service and Policies**, which ensure fair and consistent conditions for every collaboration.

#### **Step 6: Collaborate & Deliver**

Use the dedicated project workspace to communicate, exchange documents, and track milestones with your client. Once the work is approved, the funds (held in escrow) will be released to you.

## 2. Online Seminars & Workshops

**Get selected to lead high-impact virtual training.**

### **Step 1: Be Available**

Make sure your profile clearly shows your expertise and interest in conducting training sessions or workshops.

### **Step 2: Get Chosen for Relevant Requests**

Our team reviews client requests and matches them with consultants like you based on topic, experience, and availability.

### **Step 3: We Handle the Logistics**

Once selected, we'll coordinate the schedule and handle the session setup via Zoom or the client's preferred platform.

### **Step 4: Lead & Inspire**

Deliver engaging, expert-led sessions with interactive elements, Q&A, and actionable insights.

## 3. Career Consultations

**Support professionals navigating their next step.**

### **Step 1: Offer Career Consulting**

Ensure your profile includes experience in career consultation and related skills such as career mentorship, hiring, resume review, or industry-specific guidance.

### **Step 2: Get Matched or Invited**

Clients seeking career support will either find you through AI matching or open their request for proposals.

### **Step 3: Deliver Personalized Guidance**

Use the platform's workspace to offer feedback, coaching, and resources—helping your clients reach their career goals.

## 4. Industry Insights & Networking

**Join the conversation. Stay visible.**

Check out our [blog page](#) to read or contribute to expert-written articles, trend analysis, and thought leadership pieces.

Engage with other consultants and researchers in your field to expand your professional network.