BEIREK

SERVICE PROGRAM

Enterprise Portfolio Diagnostic

Corporate Diagnostic, Needs Mapping, and Program Design for Multi-Company Portfolios

BEIREK LLC - THE PROJECT MANAGEMENT COMPANY

A program for organizations that manage, support, or oversee several companies, combining company-level institutional diagnostic work with portfolio-level needs analysis in one decision system. It goes beyond recording what companies request: it shows which capability gaps are supported by evidence, which constraints recur across the portfolio, and which support products should be directed to which company groups.

> The program creates value by converting fragmented company information into comparable evidence and defensible resource-allocation decisions, not by producing more reports.

PREPARED BY
BEIREK LLC
THE PROJECT MANAGEMENT COMPANY

SERVICE PROGRAM
ENTERPRISE PORTFOLIO DIAGNOSTIC
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PROGRAM FRAMEWORK

1. Individual company reports do not explain the portfolio decision; one evidence method connects company findings to resource allocation

An umbrella organization may collect administrative records, periodic activity declarations, financial summaries, investment committee presentations, program participation data, management interviews, and company self-reporting. This material shows who the companies are and what they request. It does not, by itself, explain why a company is constrained, whether apparently similar issues share a root cause, where risk is concentrated by segment, or which intervention should receive support budget.

Without a common classification and evidence rule, visible companies can attract more resources, the same issue can be recorded under different names, established training and mentoring programs can precede measured need, and critical but poorly expressed constraints can remain hidden. When the starting condition is unknown, the sponsor also lacks a reliable basis for determining what a later program changed.

Enterprise Portfolio Diagnostic addresses this problem at two levels. At company level, it assesses each business's development stage, objective, institutional capacity, critical risks, binding growth constraints, and readiness for intervention. At portfolio level, it normalizes company findings without erasing their context and converts them into common-need clusters, risk concentrations, company segments, and support-product decisions.

The principal output is neither a company ranking nor a single average score. It is a decision view that allows the sponsor to distinguish problems requiring company-specific deep work from those suitable for a group application program, shared infrastructure or centralized services, or changes in the umbrella organization's own policy and governance system.

The program does not guarantee company performance, investment outcomes, or the effect of a support program. It establishes the verified starting condition, the intervention rationale, accountability, and the basis for remeasurement. Results depend on company participation and data, sponsor decisions, the quality of selected interventions, and implementation discipline.

PROGRAM FRAMEWORK

2. The service fits organizations with multi-company responsibilities that want to connect resource decisions to evidence

The program can be designed for organized industrial zones and specialized industrial areas, technology parks, technology-development centers, incubators and accelerators, holdings and company groups, private equity and venture capital portfolios, clusters, chambers, associations, financial institutions, and development programs. The common condition is responsibility for investment, support, coordination, governance, or performance across more than one company.

Typical buying triggers include uncertainty about which needs existing services address; many company requests without a defensible priority; an investment or program committee unable to read companies through a common decision language; limited visibility into where risk is concentrated; a shared-services budget allocated by precedent; or no reliable starting point for remeasurement.

The service is not appropriate as a general satisfaction survey without a decision purpose and authority. Diagnostic confidence will remain limited if companies only complete self-assessment forms, withhold evidence, or do not participate in factual review. Participation and data quality can also deteriorate if the sponsor cannot determine who may access company-level sensitive information. The service is the wrong tool when a predetermined company ranking, investment decision, credit decision, or compliance certificate is expected.

The entire portfolio does not always require the same assessment intensity. A manageable company universe may use full coverage. A large universe may use representative, risk-based, or opportunity-based selection. A broad and uncertain universe may begin with a scan and proceed to selected deep dives. Findings from a sample are not reported as exact proportions of the full portfolio.

Initial acceptance requires an authorized sponsor, stated decision questions, a defined company universe, selection rationale, available information, confidentiality approach, budget, and decision timetable. If these conditions are absent, BEIREK first clarifies the program design and does not start company assessments.

PROGRAM FRAMEWORK

2. The service fits organizations with multi-company responsibilities that want to connect resource decisions to evidence

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The purchasing rationale varies by portfolio. An industrial zone may need to identify which businesses genuinely require shared testing, energy, workforce, or supply capacity. A technology park may need to rebuild a general training calendar around productization, commercial validation, or financial-discipline needs. A holding may test whether central services support company decisions and execution. An investment fund may decide where its portfolio-support team should focus on governance, cash, commercial systems, or operating constraints.

These uses are not forced into one reporting package. Before engagement, the parties state the decision owner, the company universe affected by the decision, and the sponsor's authority to deploy an intervention. If the sponsor can only observe findings but cannot make resource, expert, or program decisions, the benefit is limited. BEIREK narrows the deliverables to actual authority and avoids recommendations that cannot be implemented.

PROGRAM FRAMEWORK

3. The target state separates company requests from verified needs and common problems from company-specific constraints

At completion, the sponsor should be able to read the portfolio without collapsing companies into one good-to-bad ranking. For each company, the program shows development stage, strategic objective, current and required institutional capacity, critical risk, primary constraint, evidence confidence, and readiness for intervention. At portfolio level, a common taxonomy combines those findings while preserving sector, business model, scale, and stage.

This target state creates four management capabilities. First, declared demand is separated from verified need. A company asking for sales support may actually be constrained by target-customer definition, pricing, delivery capacity, or working capital. Second, a frequent problem is distinguished from a critical one; prevalence does not establish decision impact. Third, common solvability is separated from a common symptom. A single sales program can be the wrong intervention when similar symptoms arise from different causes. Fourth, company support is separated from weaknesses in the umbrella organization's own system.

The sponsor can use this view to distinguish broad information products, applied cohort programs, company-specific deep work, shared services or infrastructure, and internal policy changes. Expert capacity, support budgets, and management attention are tied to specified problem clusters and company segments.

The benefit is not a larger activity count. The program is designed to support redesign of low-fit services, earlier visibility into critical companies, evidence-based shared-capacity investments, company grouping by need, and a common baseline for re-measurement. These benefits require sponsor decisions, company participation, information security, and ownership of implementation after the diagnostic.

Acceptance tests whether the sponsor and management committee can explain the principal company profiles, evidence limitations, priority common needs, company-specific exceptions, proposed intervention products, and open decisions without BEIREK support.

PROGRAM FRAMEWORK

3. The target state separates company requests from verified needs and common problems from company-specific constraints

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The decision view maintains three lists. “Ready for decision” contains matters with sufficient evidence and an authorized owner. “Verify first” contains matters requiring additional data, specialist opinion, or company participation. “Outside program scope” identifies questions that the diagnostic cannot answer or that require regulated professional work. The distinction prevents every finding from being presented with the same confidence or management priority.

Portfolio benefit does not replace company benefit. While the sponsor identifies shared-program opportunities, each company receives its own priority sequence, evidence gaps, and management commitments required for support. Sensitive company results may be aggregated without disclosure to other companies, but the portfolio view must not erase a company-specific critical risk. The two decision levels use a common evidence base while retaining different access and accountability.

PROGRAM FRAMEWORK

4. A two-layer model preserves company context while enabling portfolio comparison

The first layer is the company diagnostic. Each business is assessed within its development stage, sector, business model, management objective, and available resources. The method does not score an early-stage venture against the controls of an established industrial company or impose the same process set on every business. It defines the minimum capability required for the company's next objective, its current state, and the decision-relevant gap.

The company file includes the business model and stage profile, management's problem statement, functional condition, evidence confidence, critical risks, binding constraints, root-cause links, priority interventions, required specialist reviews, and starting indicators. The company's perspective is recorded during factual review, but management assertion alone does not change the assessment conclusion.

The second layer is the portfolio diagnostic. Company findings are translated into a shared needs and risk taxonomy. Raw scores are not averaged directly. Normalization considers development stage, business model, sector and regulatory intensity, scale, capital intensity, international activity, the sponsor's role in the company, and the company's near-term objective.

The portfolio layer shows recurring capability gaps, risk concentrations, common root causes, groups with similar intervention mechanics, and gaps between existing support and verified need. The result is not a standardized solution list that removes company differences. It is a portfolio decision that distinguishes several intervention routes.

The layers are not substitutes. Company reports alone cannot establish a shared program, and an aggregate survey cannot explain a company's binding constraint. Acceptance requires every portfolio conclusion to trace to company findings and sample limits and every company priority to trace to evidence and a stated objective.

PROGRAM FRAMEWORK

5. Six workstreams trace company information through intervention and resource decisions

The program uses six non-overlapping workstreams. Company lines may run in parallel according to portfolio size, but their decision dependencies remain controlled.

01

5.1 Program design and company selection

BEIREK works with the sponsor to define decision questions, company universe, selection method, diagnostic depth, common spine, sector modules, data request, confidentiality levels, governance, and acceptance criteria. The outputs are the Program Charter and company selection record. Acceptance requires the selection to represent the program purpose and all exclusions to be stated.

02

5.2 Company evidence file

The company provides information proportionate to its stage and scope. Institutional structure, finance, commercial system, operations, technology, people, risk, and management information are indexed by source, date, owner, and intended use. A missing record is not merely an absent file; failure to produce or use decision-critical data can itself be a capability finding. The output is a controlled company information and data-gap register.

03

5.3 Interviews, maturity, and constraint diagnosis

Management and relevant functions are interviewed through a common question spine. Findings are assessed by evidence confidence, current and required maturity, impact, urgency, binding effect, spread, solvability, and company readiness. A visible symptom is not automatically treated as a root cause. Outputs are the company diagnostic draft, priority register, and root-cause map.

04

5.4 Factual review and company decision

The company may identify factual errors, missing documents, and differing views. BEIREK assesses new evidence; unsupported requested changes do not remove a conclusion. The management debrief records P0-P3 priorities, specialist-review needs, company commitments, and next decisions. Outputs are the final company file and management decision record.

PROGRAM FRAMEWORK

5. Six workstreams trace company information through intervention and resource decisions

CONTINUED · 02

5.5 Portfolio normalization and needs segmentation

Company findings are translated into the common taxonomy, normalized through contextual variables, tested for risk and need clusters, and segmented by stage, primary constraint, evidence confidence, implementation readiness, and intervention intensity. Outputs are the portfolio heat map, common-needs atlas, and segmentation model.

5.6 Intervention-product and resource-allocation design

For each verified problem cluster, the program defines target company profile, entry and exit criteria, method, company inputs, expertise, deliverables, acceptance evidence, schedule basis, and remeasurement date. A management workshop decides which products to launch, redesign, or stop and assigns budgets and owners. Outputs are intervention-product cards, the resource-allocation view, and the decision book.

PROGRAM FRAMEWORK

6. Decision gates prevent scope and budget from advancing before evidence is ready

The program uses six decision gates. Each gate may pass, pass conditionally, hold, or change scope.

Gate	Decision	Minimum evidence	Output
D0 - Mandate definition	Which portfolio decision will the program support?	Sponsor, company universe, decision questions, and intended use	Opportunity and decision record
D1 - Program design	Are scope, selection, and confidentiality executable?	Program Charter, selection method, access model, and deliverables	Approved program design
D2 - Company readiness	Can the company assessment produce a decision?	Participation, data, interview plan, access, and limitations	Company readiness record
D3 - Company diagnostic	Are findings sufficient in evidence, context, and priority?	Interviews, documents, confidence labels, root causes, and second review	Company diagnostic file
D4 - Portfolio synthesis	Are company results comparable without losing their limits?	Normalization, sample limits, consistency, and cluster tests	Portfolio needs view
D5 - Intervention decision	Which support product, resource, and owner will be authorized?	Product cards, target segment, budget, measures, and dependencies	Management decision book

D0 and D1 prevent the program from becoming a general survey or uncontrolled data collection. D2 does not treat missing documents as automatic failure, but it states which conclusion the gap limits and what validation is required. D3 distinguishes assessment judgment from company assertion and regulated specialist opinion.

D4 is the critical portfolio control. Sample findings cannot become exact proportions of the full company universe; high-confidence language cannot be assigned to weak evidence; and a critical company risk cannot disappear beneath an average score. At D5, the sponsor allocates resources by considering severity, common root cause, common solvability, company readiness, and strategic priority together, not prevalence alone.

Every conditional decision has an owner, closure evidence, date, and validity boundary. Passing a gate does not guarantee the outcome of the next intervention. It establishes only that the specified commitment can be made responsibly on the current evidence.

PROGRAM FRAMEWORK

7. Clear roles protect company trust and the independence of the assessment

The umbrella organization's sponsor defines the decision purpose, company universe, resource constraints, and internal authority and resolves material participation and access issues. The program management committee decides company selection, interim findings, portfolio priorities, intervention products, and resource allocation. It sees company-sensitive information only to the extent authorized.

The BEIREK program director owns the method, team calibration, cross-company consistency, quality assurance, portfolio synthesis, and deliverables. Diagnostic leads and functional specialists conduct interviews, review sources, classify findings, and provide method expertise in specified areas. BEIREK does not present an unsupported management expectation as a finding.

The company leader and coordinator provide access to accurate information and appropriate participants, complete factual review, and identify internal action owners. Participation does not grant unilateral authority to approve the assessment result. The company remains accountable for data accuracy and undisclosed limitations.

Data and confidentiality owners manage access, transfer, retention, anonymization, and reporting levels. Where legal, tax, audit, cybersecurity, technical compliance, environmental, social, or other regulated opinions are required, qualified specialists work under separate scope and responsibility. BEIREK can coordinate this work but does not become the professional owner of the opinion.

For each material activity, the program records who supplies the input, recommends, decides, performs, verifies, and accepts. Sponsorship does not remove the company's data and participation duties; BEIREK's program management does not assume the sponsor's budget, investment, or implementation authority. Critical decisions and deliverables must have authorized owners in the Program Charter.

The role matrix goes beyond one "responsible" label. It identifies who supplies company data, writes findings, assesses factual corrections, accepts company priorities, approves portfolio segments, and authorizes budgets. Where several people contribute to a role, final decision authority remains singular and visible.

PROGRAM FRAMEWORK

7. Clear roles protect company trust and the independence of the assessment

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Escalation thresholds are set at program start. A critical continuity risk, withdrawal of company participation, unauthorized information access, new evidence that materially changes a conclusion, conflict of interest, or request for an outcome outside the method goes directly to the sponsor and BEIREK program director. Disputed findings remain in the company file with the source, differing view, interim control, and decision owner.

PROGRAM FRAMEWORK

8. Deliverables separate the company decision from the portfolio decision while keeping both traceable

The company file includes the business model and stage profile, management objective, executive diagnostic summary, functional maturity view, constraint and root-cause map, critical risk register, priority intervention plan, support-requirement specification, baseline indicators, evidence register, and management debrief. Diagnostic depth may change the level of detail, but material findings, confidence labels, and priority logic remain controlled.

The portfolio-level deliverables are:

- **Portfolio Diagnostic Report:** Scope, method, company segments, shared needs, risk concentrations, binding constraints, and management conclusions.
- **Portfolio Heat Map:** Comparative view by company, function, priority, stage, segment, and evidence confidence.
- **Common Needs and Root-Cause Atlas:** Recurring symptoms, common causes, company distribution, and solution mechanics.
- **Need-State Segmentation:** Company groups based on primary constraint, readiness, and intervention intensity in addition to industry labels.
- **Intervention Design:** Assignment of problems to broad programs, company-group applications, company-specific work, shared infrastructure, or sponsor policy.
- **Support-Product Cards:** Problem, target company, entry condition, method, deliverable, owner, measure, schedule basis, and exit decision.
- **Resource-Allocation View:** Link from budgets, expert capacity, and management attention to defined segments and problems.
- **Management Decision Book:** Priorities, budgets, ownership, timetable, open conditions, and remeasurement decisions.

Where useful, the program can create an updateable portfolio data set and dashboard. This tool is designed to track decision-relevant companies and needs, not to create a new reporting burden. Data definitions, ownership, update frequency, and access levels are explicit.

Acceptance is not based on file count. Every material portfolio conclusion must trace to company evidence, every intervention product to a verified problem, and every resource decision to an authorized owner and measure.

PROGRAM FRAMEWORK

8. Deliverables separate the company decision from the portfolio decision while keeping both traceable

CONTINUED · 02

Company-deliverable acceptance requires every critical executive finding to appear in the evidence register; actions in the priority plan to reconcile with the root-cause map; support specifications to state the company data, team, and decision capacity required; and baseline indicators to have a defined source and data date. Completion of factual review does not mean that the company agrees with every assessment judgment.

Portfolio-deliverable acceptance requires company counts and segment distribution to reconcile with the selection record; common needs to pass the root-cause test; critical heat-map cells to open to source findings; target companies and exclusions for proposed products to be explicit; and the decision book to record budget and accountability. Draft data, charts, or tables are not presented as final decision views.

PROGRAM FRAMEWORK

9. Success is verified through decision production and remeasurement capability, not report completion

Coverage and quality measures can track company participation, minimum information availability, evidence confidence for critical findings, completion of factual review, and consistency among assessors. These measures indicate method quality. They do not, by themselves, demonstrate improved company performance.

Decision measures can track P0/P1 findings with owners and dates, priorities that reach management decisions, the share of program budget linked to verified needs, and low-fit services that are redesigned or stopped. Each measure requires a definition, source system, data date, owner, and specified decision use.

Intervention-product measures test whether the target profile and entry/exit criteria are applied, companies produce tangible outputs, shared programs and company-specific work are correctly separated, and remeasurement is prepared. Participant volume or satisfaction alone does not establish institutional-capacity development.

Outcome measures belong to post-diagnostic implementation. A repeat diagnostic may track closed priority gaps, relevant company-indicator movement, lower critical risk, or changed decision speed. External conditions, company actions, and other interventions must be considered before any change is attributed to Enterprise Portfolio Diagnostic.

Content acceptance uses three lenses. A decision-maker must understand the portfolio decision and budget implications. An implementer must be able to operate company selection, data, interviews, scoring, gates, and deliverables. A skeptical company or sponsor must see the evidence limits, access rules, BEIREK's role, and outcomes that are not guaranteed.

Metric design does not allow the ease of producing a number to override decision value. Where companies use different definitions, the measures are reconciled first; missing data is not recorded as zero. A decline in low-confidence findings may indicate improved capacity or merely better information. Interpretation describes the measurement mechanism and plausible reasons for change.

PROGRAM FRAMEWORK

9. Success is verified through decision production and remeasurement capability, not report completion

CONTINUED · 02

The starting point and repeat measurement should use a comparable company universe, definition, data source, and scope. Company mergers, closures, new entrants, or changed measures require a stated comparison group. An outcome indicator is not treated as diagnostic performance without visibility into whether the intervention was implemented and whether the company completed its required actions.

PROGRAM FRAMEWORK

10. The schedule is built from portfolio size, selection model, information quality, and deep-dive requirements

The program has no universal duration. The timetable depends on company count and diversity, full-coverage or sample design, diagnostic depth, information readiness, interview participation, specialist modules, factual-review periods, confidentiality approvals, and the scope of intervention-design workshops.

The plan covers the Program Charter, company communication and readiness, desktop review, interviews, evidence follow-up, company drafts, factual review, portfolio normalization, segmentation, intervention design, and management decision session. Company lines can run in parallel. The objective is not to move every company on the same calendar day but to apply the same quality gates.

The management cadence includes weekly program control, company-finding calibration, critical escalation, portfolio-synthesis review, and gate decisions. Meeting volume is not value; every session has a stated owner, input, and output. Late information, scope changes, participation loss, or new deep-dive needs are recorded with schedule and budget effects.

The management committee should receive enough information to decide the portfolio without unnecessary access to company-sensitive detail. BEIREK presents interim findings with sample and evidence limitations. Shared programs or precise portfolio percentages are not issued before sufficient company evidence exists.

The timetable is accepted through data cutoffs, factual-review windows, decision gates, deliverable issue dates, and the intended remeasurement date. Delay by one company does not automatically stop the whole program. D4 may, however, hold if the delay changes representation of a critical segment or materially affects portfolio conclusions.

PROGRAM FRAMEWORK

11. The diagnostic does not replace audit, investment decisions, certification, or company management

Enterprise Portfolio Diagnostic is not an independent financial audit, tax review, legal opinion, full-scope due diligence, company valuation, investment advice, credit decision, technical compliance certification, ISO certification, or regulatory certification. Critical signals in these areas are referred to qualified professionals. Specialist work has its own scope, method, assurance, and responsibility.

The program does not replace company management. BEIREK defines findings, priorities, intervention options, and decision conditions; it does not execute the company's commercial, operating, or people decisions. The umbrella organization owns support-budget and portfolio-policy decisions. Companies retain responsibility for data, participation, and implementation.

Maturity and priority scores are not company values or investment rankings. The portfolio heat map supports decisions but does not determine resource allocation alone. Management strategy, solution cost, company readiness, risk appetite, and evidence confidence are considered together. Sample results do not automatically apply to unassessed companies.

The program adds no unsupported performance improvement, program-effect, financing outcome, or client case. Illustrative schedules and applications are labeled as such. Reference to an external method does not mean that the corresponding institution has approved or certified BEIREK's service.

Scope and reliance limits appear in the Program Charter, company files, and portfolio report. If a document will be used for another decision, evidence sufficiency is reassessed. Initial acceptance does not create automatic third-party reliance.

BEIREK

ENTERPRISE PORTFOLIO DIAGNOSTIC

Technical Appendix

TECHNICAL MODULE

A1. The Program Charter aligns the company universe, selection model, and diagnostic depth with the decision purpose

The Program Charter defines the institutional purpose; management questions; company universe; inclusion and exclusion criteria; selection method; diagnostic depth; common assessment domains; sector modules; minimum information; confidentiality and access levels; sponsor and decision body; company communications; quality assurance and challenge route; deliverables; acceptance criteria; aggregation level; intervention-design sessions; and remeasurement intent.

Five selection methods may be used. Full-portfolio coverage assesses all companies in a manageable universe and reduces sampling bias. Representative sampling balances sector, scale, exports, technology, stage, and previous program participation. Risk-based selection prioritizes financial deterioration, rapid growth, management change, customer concentration, or critical operating risk. Opportunity-based selection targets high-potential companies constrained by institutional-capacity gaps. Two-stage selection begins with a broad scan and then deepens selected cases.

Diagnostic depth can use three levels. Level A is a portfolio scan using standard information, a management interview, and limited functional review to produce profiles and deep-dive candidates. Level B is the principal assessment, including management and relevant functional interviews, documentation, maturity, risk, constraints, company reporting, and portfolio synthesis. Level C is a targeted deep dive into finance, sales, operations, governance, organization, product, or another area found critical or complex in the standard diagnostic.

Depth does not rank company importance. It describes the evidence and method intensity required by the decision. Level A cannot support a high-confidence specialist conclusion, and Level C is not applied automatically to all companies. Acceptance requires a written rationale for each company's selection and depth, the portfolio segment represented, and the permitted use of results.

Selection bias is tested in three places. Companies that volunteer may be more ready or visible. Companies unable to provide information can make portfolio risk appear lower. Selection of only distressed or only high-potential companies does not represent the full portfolio. These effects appear in the selection record and portfolio report.

TECHNICAL MODULE

A1. The Program Charter aligns the company universe, selection model, and diagnostic depth with the decision purpose

CONTINUED · 02

The selection record states the inclusion basis, represented portfolio segment, participation status, information sufficiency, and permitted aggregation. If a company exits the program, replacement is not automatic; comparability and schedule effects return to D1 or D4.

TECHNICAL MODULE

A2. The data, interview, and evidence system separates assertions from verified findings

The minimum information spine has five groups. Institutional information covers ownership and management structure, organization, activities, objectives, and critical contracts. Financial information covers revenue, cost, cash, budget, customer and product mix, collections, debt, and working capital. Commercial information covers target customers, sales pipeline, proposals, pricing, channels, repeat orders, and customer loss. Operations and technology cover delivery flow, capacity, quality, supply, systems, product road map, and intellectual property. People and governance cover critical roles, authority, management cadence, performance, and core policies.

Interviews are not unstructured conversations. The opening interview captures company objectives, management's problem statement, and critical decisions. Functional interviews test how different owners see the same issue. Evidence follow-up addresses conflicts and gaps. Factual review allows correction of false information or missing documents without transferring assessment independence.

Every finding carries one of four confidence levels. Level A is verified through a controlled document, system data, or independent sources. Level B is supported by additional documents, examples, or a second view. Level C is based on one interview or self-assessment and remains a hypothesis. Level D means required information is unavailable or inaccessible; the gap becomes a separate risk and capability finding.

Maturity runs from 0 through 4: absent, reactive, defined, managed, and integrated/scalable. The scale is not a competition. Current maturity, required maturity for the company objective, and the material gap are shown together. A control sufficient for an early venture may be inadequate for a regulated industrial business.

Priority considers impact, urgency, binding effect, spread, solvability, and readiness. P0 addresses continuity or critical risk; P1 a direct binding constraint; P2 a capability gap affecting near-term objectives; and P3 a development opportunity for efficiency or scalability. Each priority links to evidence, ownership, dependencies, and closure.

TECHNICAL MODULE

A2. The data, interview, and evidence system separates assertions from verified findings

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The evidence register includes finding identity, source type, source owner, date, version, reviewed scope, confidence, conflicting sources, assessor judgment, and reliance limitation. An interview note and a verified record are not placed in the same class. The presence of a procedure does not prove it operates; use examples, decision trails, or system data are requested where needed.

A maturity score does not determine intervention by itself. A critical contract or cash risk may take priority even when maturity is otherwise strong. Low maturity can wait when it does not affect the near-term objective. Priority combines score, constraint link, risk impact, readiness, and implementation feasibility.

TECHNICAL MODULE

A3. A common institutional spine compares eight domains while optional modules preserve company and sector context

The common spine covers eight domains: strategy and business model; financial management and economic visibility; governance, law, and risk; organization, leadership, and people capacity; customer, brand, sales, and go-to-market model; operations, supply, and quality; product, technology, and innovation; and data, digital systems, and management reporting.

Each domain uses the same control logic: company objective, current practice, decision owner, information and evidence, current and required maturity, critical risk, cross-functional effect, constraint, and proposed intervention. The common spine does not repeat the same questions mechanically. An irrelevant domain is not penalized through a low score; the scope decision is documented in the Program Charter.

Optional modules may include manufacturing productivity and capacity, exports and international markets, post-investment value creation, intellectual property and commercialization, family-business governance, environmental and social management, energy and resource efficiency, regulatory and certification readiness, supplier development, and post-acquisition integration.

Industrial zones and manufacturing clusters may emphasize energy, workforce, quality, testing, certification, logistics, supply, and shared infrastructure. Technology portfolios may emphasize product-market fit, commercialization, productization, intellectual property, cash runway, and international customer acquisition. Holdings may emphasize decision rights, capital allocation, shared reporting, central services, and management depth; investment portfolios may focus on the investment thesis, board capacity, commercial scaling, cash, and support-resource priority.

Adding a module does not create a specialist opinion. Where qualified professional review is required, BEIREK defines the management question, inputs, and integration route while the specialist owns the result.

Module selection may be common at portfolio level and different at company level. All companies in a manufacturing portfolio may use capacity and quality questions, while the export module is applied only where international growth is part of the objective. Productization may be shared across a technology portfolio, while regulated-product companies require additional compliance expertise.

TECHNICAL MODULE

A3. A common institutional spine compares eight domains while optional modules preserve company and sector context

CONTINUED · 02

Every module defines an entry question, required information, interview roles, finding classes, specialist boundary, and expected output. This prevents modules from being added for appearance. Module results are connected to the common spine; a productization finding is not presented without its finance, sales, and people dependencies.

TECHNICAL MODULE

A4. Eight diagnostic domains identify the gap that binds company objectives to available resources

01

A4.1 Strategy and business model

The review covers the customer problem, target segment, revenue model, separation of product and project revenue, growth assumptions, defensible advantage, translation of priorities into budgets and teams, and stop criteria. Multiple simultaneous priorities, founder relationships treated as institutional market access, or revenue targets without channel, capacity, and cash assumptions are typical risks. The output records assumptions to validate, focus decisions, and resource-consuming fragmentation.

02

A4.2 Financial management and economic visibility

The review covers conversion of accounting data into management reporting, budgets and forecasts, product/customer/project contribution, fixed and variable costs, pricing, collections, working capital, debt, scenarios, and financing needs. Revenue and bank balance as the only measures, confusion between profit and cash, or failure to model the working-capital effect of growth can create decision risk. Outputs are economic blind spots, cash and cost constraints, and priority financial controls. This is not an audit or valuation.

03

A4.3 Governance, law, and risk

The review covers ownership and authority, board decisions, signature and spending limits, owner rights, critical contracts, intellectual property, core compliance, disputes, insurance, continuity, and risk ownership. Differences between actual decisions and legal authority, intellectual property held personally, or unowned critical risks may require specialist review. Outputs are management and authority priorities, critical risks, and referrals for qualified legal, tax, or compliance review.

TECHNICAL MODULE

A4. Eight diagnostic domains identify the gap that binds company objectives to available resources

CONTINUED · 02

01

A4.4 Organization, leadership, and people capacity

The review covers fit between organization and business model, critical roles, founder and management time, decision level, delegation, skills, hiring, performance, incentives, succession, and cross-functional work. Responding to every problem through hiring, concentrating decisions in the founder, or leaving role outputs undefined indicates structural issues beyond headcount. Outputs are role and capability gaps, decision rights, and structural issues to address before hiring.

02

A4.5 Customer, brand, sales, and go-to-market

The review connects target segments, customer problem, value proposition, brand perception, demand channels, opportunity qualification, sales stages, conversion, loss reasons, proposals, price, accountabilities, channel partners, repeat sales, and market entry. Treating a contact list as a sales pipeline, founder-dependent sales, or proposal volume as the only success measure can hide the commercial constraint. Outputs are principal leakage points, segment priorities, required sales data, and validation actions.

03

A4.6 Operations, supply, and quality

The review covers value flow, order-to-delivery time, capacity and constraints, planning, supplier concentration, inventory, quality, rework, project and change control, maintenance, and alignment between customer promises and operations. Calculating capacity without people, quality, or supply constraints, or masking delays through overtime, can indicate a system problem beneath the visible symptom. Outputs are delivery and capacity risks, shared-infrastructure opportunities, and priority process controls.

04

A4.7 Product, technology, and innovation

The review covers the product portfolio, requirements, road map, technical debt, links between research and commercialization, distinction between pilot and paid use, acceptance criteria, intellectual property, cost, manufacturability, and technology dependence. Adding every request to the road map, treating technical success as commercial validation, or concentrating knowledge in one person can constrain scale. Outputs are productization, technology, intellectual-property, and commercialization priorities.

TECHNICAL MODULE

A4. Eight diagnostic domains identify the gap that binds company objectives to available resources

CONTINUED · 03

A4.8 Data, digital systems, and management reporting

The review covers decision data, definitions and ownership, links among finance/CRM/operations/project/people systems, dependence on personal files, reporting timing, data quality, access, backup, information security, and digital investment sequence. Different calculations of the same KPI, use of ERP without data discipline, or reports produced after the decision meeting can indicate a management issue rather than a software problem. Outputs are the decision-data spine, information gaps, system-use issues, and digital priorities.

The functional domains are not independent scoring islands. Strategy links to sales assumptions; sales promises to delivery capacity; delivery to supply and cash; growth to organization and governance; and all these decisions to information quality. BEIREK shows cross-domain causes in the root-cause map.

The company file does not produce a long deficiency list for every domain. It highlights three decision-relevant outcomes: continuity or liability risks; capability gaps binding the strategic objective; and management systems that must be established before other investments can work. Lower-impact development areas may be recorded without occupying the same management priority.

TECHNICAL MODULE

A5. Root-cause analysis and the needs profile convert visible demand into the right intervention type

The diagnostic does not treat the company's first statement as the conclusion. "We need more salespeople" can arise from an unclear target customer, a value proposition not translated into purchase criteria, no proposal standard, operations unable to support opportunities, or no loss data. Hiring alone can increase the constraint.

"We need financing" can arise from prices below cost, collection terms misaligned with supplier payments, missing inventory planning, expansion of loss-making products, or reports unable to support a financier's review. New funds may extend structural cash consumption without correcting it.

"We need to digitalize" can arise from absent process ownership and data definitions, different methods for the same work, or no link between management decisions and data. Buying software before designing the process and decision can institutionalize inconsistency.

Each company receives a multi-dimensional needs profile rather than a single total score. The profile includes development stage, strategic objective, current and required maturity, critical risk, primary and secondary constraints, evidence confidence, management readiness, intervention intensity, fit for a common program, and need for company-specific deep work.

Illustrative archetypes include commercial-proof gap, founder bottleneck, economic-visibility gap, delivery constraint, governance and control gap, and productization gap. Archetypes are temporary and explainable groupings for intervention design, not permanent labels.

The root-cause chain includes the visible symptom, intermediate mechanism, binding cause, business effect, and validation evidence. Low sales are not explained through customer count alone, cash pressure through bank balance alone, or capacity through machine utilization alone. The chain shows which assumption management must test and which control should be built first.

TECHNICAL MODULE

A5. Root-cause analysis and the needs profile convert visible demand into the right intervention type

CONTINUED · 02

Where several root causes remain possible, the assessment does not claim certainty. It records alternative hypotheses, the data or experiment that distinguishes them, and the risk of the wrong intervention. If the company is not ready to provide evidence, it may not meet the entry condition for the proposed support product.

When the needs profile becomes a decision table, it shows which root cause each potential intervention addresses, the company conditions under which it can work, and the new evidence that will trigger reassessment. If more than one intervention path remains viable, the choice is explained through urgency, feasibility, management capacity, and dependencies on other work. Residual uncertainty remains explicit; a low-confidence hypothesis is not presented as a high-confidence program rationale.

TECHNICAL MODULE

A6. Normalization, heat maps, and segmentation prevent raw scores from erasing context

Normalization considers company age, development stage, business model, sector and regulation, employee and revenue scale, capital intensity, international activity, sponsor role, and near-term objective. Missing written procedures may not be critical for an early venture, while absence of customer data can be. In manufacturing, quality records and maintenance planning can be critical regardless of size.

Each portfolio heat-map cell carries at least current maturity, required maturity, priority class, and evidence confidence. Views can show company by function, company by priority, sector by need, stage by need, archetype by company, evidence by domain, and existing support by addressed need. Color is not the decision; source findings and limitations remain accessible.

A common problem cluster passes four tests. Prevalence asks how many companies experience the issue. Severity tests performance and continuity effects. Common root cause determines whether the same symptom arises through similar mechanisms. Common solvability tests whether one method and deliverable can support a group intervention.

Need-state segmentation groups companies by stage, primary constraint, secondary gaps, management readiness, intervention intensity, common-program potential, specialist needs, and data sufficiency. Companies from different sectors but similar needs can enter the same application; companies from one sector with different causes are not forced into one program.

Acceptance requires critical P0/P1 findings not to disappear in averages, company distribution to reflect the sample limit, segment inclusion and exclusion criteria to be explicit, and intervention recommendations to pass the common root-cause test.

Cluster stability is also tested. One company with many findings should not inflate common-need intensity; one root cause should not be counted repeatedly under different functions; and weak evidence should not carry the same weight as verified findings. Counts, company share, severity, and confidence can be shown separately.

TECHNICAL MODULE

A6. Normalization, heat maps, and segmentation prevent raw scores from erasing context

CONTINUED · 02

Segments are matched with company readiness before resource allocation. Two companies may share a need while only one can provide data and an accountable owner. Common-program entry depends on both need similarity and minimum implementation readiness. The other company may first require information, governance, or decision ownership.

TECHNICAL MODULE

A7. Support-product design connects findings to target companies, implementation outputs, and remeasurement

Each support product defines the verified problem, root cause, target company profile, entry criteria, exclusions or deep-dive conditions, required information and management commitment, method, intensity, schedule basis, expert profile, company output, outcome measures, exit or continuation decision, and remeasurement date.

There are five intervention levels. Common information and standard products provide broad foundational tools. Cohort application programs use company data to produce real outputs for a limited group with the same root cause. Company-specific deep work addresses complex or sensitive issues. Shared services and infrastructure centralize expertise, testing, procurement, information, or export capacity that one company cannot build economically. Sponsor policy changes address problems arising from the support program, data, or allocation system itself.

For example, a pricing and unit-economics issue may require an applied cost bridge, price corridor, discount authority, and proposal-margin control rather than general finance training. Founder-dependent B2B sales may require target accounts, opportunity theses, sales stages, proposal standards, and a weekly control cadence rather than more lead lists.

If several manufacturers in an industrial zone share testing and certification gaps, the response may combine a common gap review, expert access, test infrastructure, and company closure plans. If group companies use inconsistent KPI definitions, the response may be a core data dictionary, ownership, reporting timetable, and decision use rather than more reports.

These examples are not ready-made product promises. Actual design depends on portfolio findings, company readiness, existing services, budget, and specialist needs. Acceptance requires each product to state its problem, target group, tangible output, owner, measure, and remeasurement gate.

The product card includes exit and stop conditions as well as entry criteria. If a company does not provide information, appoint an authorized owner, or produce required outputs, continuation is not automatic. If the common-root-cause assumption fails during implementation, the cohort may split or the product may be redesigned.

TECHNICAL MODULE

A7. Support-product design connects findings to target companies, implementation outputs, and remeasurement

CONTINUED · 02

Resource decisions are not based on maximizing participant volume. Expert effort per company, shared-infrastructure requirements, company time or co-funding, and expected decision value are considered together. The sponsor maps existing providers and programs; a new product must address an unmet need or a method gap in current support.

TECHNICAL MODULE

A8. Confidentiality and quality assurance protect company participation and the reliability of portfolio comparison

Information uses three levels. Company-confidential information includes detailed financial, commercial, technical, legal, and people data and is limited to the authorized diagnostic team and named representatives. Company-level management results include limited priority, risk, and intervention-fit information and use role-based access. Aggregated portfolio information includes common needs, distributions, segments, and program recommendations; company identity is anonymized where appropriate.

Controls include purpose-limited information requests, role-based access, file and version management, separation of interview notes from reports, factual review, minimum group size for aggregation, retention and disposal schedules, and conflict-of-interest declarations. Confidentiality is an operating condition for companies to share reliable evidence, not merely a contract clause.

Quality assurance includes assessor calibration, a common question and evidence guide, second review of critical findings, checks for excessive score differences among comparable companies, factual review, a methodology log, and portfolio-synthesis review. P0/P1 priorities, high-confidence judgments based on weak evidence, and classifications outside the taxonomy receive additional review.

Portfolio synthesis tests whether aggregate conclusions are stated with more certainty than the company sample supports, whether causal language exceeds the evidence, and whether company confidentiality is protected. Material disagreements remain recorded with the source, party, and decision authority.

Access is task-based. Assessors see the detail required for assigned companies and domains, portfolio analysts receive the controlled fields required for normalization, and the management committee receives the company-level or aggregated result required for decisions. Broad access to raw data is not treated as transparency. Role changes, team departures, and program closure update the access register.

Quality assurance produces its own acceptance record. It confirms second review of critical findings, explanation of score differences, method exceptions, processing of factual comments, and compliance of portfolio synthesis with sample limits. Company files and portfolio views are not final before these checks close.

TECHNICAL MODULE

A8. Confidentiality and quality assurance protect company participation and the reliability of portfolio comparison

CONTINUED · 02

Exception management follows the same audit-trail principle. Departures from the common questions, progress with incomplete evidence, company-requested access restrictions, or classification changes record the rationale, approval owner, and effect on the result. A company's factual correction does not automatically replace the assessment team's independent judgment; unresolved differences remain visible at the appropriate level in both the company file and portfolio synthesis.

TECHNICAL MODULE

A9. A twenty-company, ten-week flow is an illustrative planning case only

The following flow preserves the twenty-company example in the source brief. It is neither a standard proposal nor a schedule commitment; it changes with company diversity, information quality, selected depth, and targeted deep dives.

Period	Activity	Principal output
Week 1	Program Charter, company universe, selection, and communication	Approved program design
Week 2	Information request, company readiness, and desktop review	Company files and data-gap register
Weeks 3-5	Management and functional interviews	Interview and initial-finding records
Weeks 4-6	Evidence validation, maturity, and risk assessment	Company diagnostic drafts
Weeks 6-7	Root-cause and priority work	Company intervention plans
Weeks 7-8	Factual review and management debrief	Final company files
Weeks 8-9	Normalization, segmentation, and heat map	Portfolio needs view
Week 9	Shared-problem and support-product workshops	Intervention design
Week 10	Management presentation and decision session	Portfolio report and decision book

Companies need not move on the same calendar day; they pass the same gates and quality standards. Material information delays, participation loss, or deep-dive needs are recorded with their effect on representation. The schedule is finalized only after the real company universe and access are confirmed.

A common method team connects parallel company lines through weekly calibration. Learning from early companies can update questions or evidence requests for later companies, but earlier conclusions are not changed silently. Method changes record affected companies and the need for re-review. The management presentation waits for the representation and quality required by D4, not necessarily for all company files to close on one date.

TECHNICAL MODULE

A9. A twenty-company, ten-week flow is an illustrative planning case only

CONTINUED · 02

Resource planning is not derived directly from company count. Availability in the same period, sector diversity, language and location requirements, sensitive-data handling, specialist review, and factual-feedback time are treated as separate capacity lanes. The Program Charter shows which lanes can run in parallel and which dependency constrains progress.

Schedule acceptance means more than publishing activity dates. Each period identifies its entry condition, expected evidence, decision owner, consequence of delay, and replanning authority. This structure prevents schedule pressure from lowering the evidence standard while allowing the sponsor to see early how delays affect scope, representation, and the decision date.

TECHNICAL MODULE

A10. Method references inform the approach but do not replace BEIREK's engagement design

The source brief identifies four institutional references. The NIST Baldrige Excellence Framework addresses leadership, strategy, customers, measurement, workforce, operations, and results through integrated self-assessment questions. The IFC SME Governance Guidebook adapts governance practices to small and medium companies at different lifecycle and development stages. The OECD/Eurostat Oslo Manual 2018 provides common concepts and measurement guidance for innovation activities and outcomes. UNIDO's inclusive and sustainable cluster-development approach connects selection, governance, diagnostic work, shared vision, action, implementation, and monitoring.

BEIREK does not copy one framework or assess on behalf of those institutions. Stage calibration, evidence confidence, cross-functional root causes, portfolio normalization, and support-product design are combined for the specific decision purpose. External references inform method design; they do not create a score, certificate, or institutional endorsement.

Sources and versions are reviewed for intended use at program start. Where a current standard, regulation, or professional opinion is binding, the relevant primary source and qualified specialist are separately assigned. Acceptance requires the methodology log to identify the definitions, measures, and adaptations used.

The methodology log also separates the basis of BEIREK-specific decisions: maturity thresholds, priority classes, normalization variables, segment definitions, and intervention-product criteria identify the underlying source, program purpose, or explicit assumption. This distinction prevents external frameworks from being confused with BEIREK's application and supports consistent remeasurement.

Reference use is not limited to matching section titles. BEIREK records the decision question supported by each external source, the concept it defines, and the adaptation made for the company context. Assessment steps outside the source's scope are identified as part of BEIREK's method or an explicit program assumption. A recognized institution's name therefore does not become support for an unverified method or assurance claim.

TECHNICAL MODULE

A10. Method references inform the approach but do not replace BEIREK's engagement design

CONTINUED · 02

The start-of-program check covers the official publisher, version or publication date, principal document accessed, and stated limitation of use. If a reference later changes, existing company results are not automatically reclassified; the effect on criteria and remeasurement is assessed. Method acceptance depends on an explainable and consistently applied decision chain, not the number of cited frameworks.

BEIREK

PROGRAM CONCLUSION

CONCLUSION

Enterprise Portfolio Diagnostic

Enterprise Portfolio Diagnostic connects company constraints with portfolio decisions rather than creating a shared archive of company reports. The first step is D0 and D1: approve a Program Charter with the authorized sponsor, stating decision questions, company universe, selection method, diagnostic depth, confidentiality model, and deliverable acceptance. Once these gates pass, BEIREK can assess companies through one evidence and priority method, and the sponsor can decide which support should be shared, which should be company-specific, and which requires change in its own system.