Enterprise Value Leakage™ Self-Diagnostic

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Use this executive self-assessment to evaluate the operating conditions required to realize value from a strategic commitment. Select a defined initiative or portfolio, involve its sponsor and operating owners, and support each rating with current evidence.

The result is a directional signal regarding execution conditions. It does not quantify financial loss or provide an independent assurance opinion.

Assessment profile

Assessment ID and date

_____

Program project or portfolio

_____

Organization and business unit

_____

Strategic objective and expected value

_____

Investment range and lifecycle stage

_____

Executive sponsor and accountable outcome owner

_____

Assessment lead and participants

_____

Scope boundaries and key dependencies

_____

How to complete the assessment

Score each statement from 1 to 5 based on the current operating reality. Record supporting evidence and describe any uncertainty. When evidence is mixed, apply the weaker condition. Leave an item unscored when evidence is insufficient and resolve it before calculating an overall result.

Rating	Operating condition
1	Absent or ad hoc
2	Known but inconsistently managed
3	Defined but unevenly applied
4	Integrated and actively governed
5	Adaptive, evidenced, and sustained

Calculate the result

Domain score = average of its three item ratings. Domain value integrity = domain score × 20. Overall Value Integrity Score = average of all six domain scores × 20. Calculate only after all 18 statements are rated. Higher scores indicate stronger conditions for value realization. Prioritize the two lowest domains and any material issue requiring immediate attention.

Integrity score	Exposure band
80 to 100	Controlled
60 to below 80	Managed
40 to below 60	Material
20 to below 40	Critical

Apply bands to the unrounded result; round only for display. These descriptive bands guide discussion and do not estimate the percentage of financial value lost.

Portfolio pipeline reflection

Are proposed investments visible alongside funded work, and can leaders reconcile the pipeline with available capability, capacity, and benefit timing? Record evidence and an action. This supplemental question is outside the 18-item score.

_____

_____

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Assessment statements

1 Strategic Intent and Value Case

Statement	Score 1 to 5 and evidence
1. The initiative has a defined business outcome, measurable value indicators, and an accountable outcome owner.	Score: ____ Evidence: _____ _____
2. The assumptions required to realize value are explicit and periodically tested.	Score: ____ Evidence: _____ _____
3. Leaders can distinguish delivery progress from realized business value.	Score: ____ Evidence: _____ _____

Domain score ____ /5 Value integrity ____ /100
Key exposure or decision required: _____

2 Investment and Portfolio Governance

Statement	Score 1 to 5 and evidence
1. Investment decisions can be revisited when material evidence of execution changes.	Score: ____ Evidence: _____ _____
2. Decision rights and escalation thresholds are clearly defined across strategic, portfolio, and delivery tiers.	Score: ____ Evidence: _____ _____
3. The portfolio is actively re-sequenced when priorities, capacity, or risk change.	Score: ____ Evidence: _____ _____

Domain score ____ /5 Value integrity ____ /100
Key exposure or decision required: _____

Assessment statements

3 Sequencing and Dependency Control

Statement	Score 1 to 5 and evidence
1. Critical dependencies and shared constraints are visible across the affected functions.	Score: ____ Evidence: _____ _____
2. The order of work reflects readiness, capacity, and benefit timing—not just requested dates.	Score: ____ Evidence: _____ _____
3. Accountable owners and agreed-upon decision points are in place for cross-functional handoffs.	Score: ____ Evidence: _____ _____

Domain score ____ /5 Value integrity ____ /100
Key exposure or decision required: _____

4 Execution Capacity and Accountability

Statement	Score 1 to 5 and evidence
1. Accountable leaders have the capacity and intelligence for the people and capabilities their commitments require.	Score: ____ Evidence: _____ _____
2. Key delivery commitments have clear enterprise ownership, with no single function able to resolve the issue.	Score: ____ Evidence: _____ _____
3. Material constraints are identified early enough to protect the intended value.	Score: ____ Evidence: _____ _____

Domain score ____ /5 Value integrity ____ /100
Key exposure or decision required: _____

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Assessment statements

5 Change Adoption and Operating Readiness

Statement	Score 1 to 5 and evidence
1. Operating owners and impacted teams are engaged before delivery decisions are finalized.	Score: ____ Evidence: _____ _____
2. Workforce, process, control, and adoption impacts are addressed during execution—not afterward.	Score: ____ Evidence: _____ _____
3. Readiness measures help determine when to scale, pause, or adapt.	Score: ____ Evidence: _____ _____

Domain score ____ /5 Value integrity ____ /100
Key exposure or decision required: _____

6 Value Evidence and Adaptive Learning

Statement	Score 1 to 5 and evidence
1. Portfolio reviews consider value evidence, not just scope, schedule, and spend.	Score: ____ Evidence: _____ _____
2. Leaders use evidence to modify, pause, or stop work before value loss becomes structural.	Score: ____ Evidence: _____ _____
3. Lessons from execution inform future investment and sequencing decisions.	Score: ____ Evidence: _____ _____

Domain score ____ /5 Value integrity ____ /100
Key exposure or decision required: _____

Executive results and next action

Domain	Score /5	Integrity /100
1 Strategic Intent and Value Case		
2 Investment and Portfolio Governance		
3 Sequencing and Dependency Control		
4 Execution Capacity and Accountability		
5 Change Adoption and Operating Readiness		
6 Value Evidence and Adaptive Learning		
Overall Value Integrity Score		

Exposure band: Controlled / Managed / Material / Critical
Priority exposure areas: _____
Critical enterprise handoff or decision: _____
Evidence requiring attention: _____
Action: Proceed / Re-sequence / Stabilize / Modify / Pause / Escalate
Accountable executive and decision date: _____

Turn the signal into action

Agree on the evidence supporting the required decision and the owner authorized to take corrective action. Use the Value Leakage Canvas to examine causes and the Thirty-Day Action Card to mobilize an initial response.

For a professionally scoped Enterprise Value Leakage Assessment, discuss the exposure and desired outcome with Enterprise Execution at solutions@enterpriseexecution.com or at https://enterpriseexecution.com

Assessment basis: Enterprise Value Leakage Assessment™ editable instrument, dated October 2026. The six domains and 18 statements are preserved; this Word edition adds explicit scoring guidance and an unscored portfolio pipeline reflection.