DIAGNOSTIC

Portfolio Maturity Diagnostic for Contract Pharma

An unbiased view of how your portfolio is run, and where to improve it first

Portex Advisory

10	4	2	3
capability areas	levels, from Ad hoc to Optimised	scopes: project and portfolio	outputs: scorecard, report, debrief

We help you see whether your governance still fits your business

A business needs different things from its governance as it grows, restructures, shifts strategy or changes leadership. The structures you have today may have been built for the business you used to run.

The old way of deciding can carry on unchallenged. Nothing prompts anyone to look again. **An unbiased read lets you choose where to improve first.**

ABOUT PORTEX

We help pharma R&D leaders execute their portfolios better, by building governance infrastructure that fits their future, not their past.



Alpesh Mistry, Founder, Portex Advisory
MPharm (Hons) · PhD
Executive MBA

"**I spent 16 years in pharma R&D at AstraZeneca, GSK and Novo Nordisk**, most recently as a Portfolio Director and as the Portfolio Management representative on a senior Research Governance Committee. I saw close up how governance succeeds and fails as businesses change."

WHAT IT EXAMINES

Ten capability areas, set in a contract pharma context of multiple clients, shared resources and fixed-price work.

Shaping the portfolio

1. **Work intake.** How new work is screened, ranked and accepted.
2. **Resources and capacity.** Whether people and equipment can meet commitments.

Governing and steering it

3. **Structure and roles.** Who holds portfolio-level authority.
4. **Decision rights and escalation.** Who decides what, and when it moves up.
5. **Risk and dependencies.** Exposure across clients, projects and shared resources.
6. **Financial management.** Margin and value across the whole book of work.
7. **Reporting and dashboards.** Measures that are accurate and drive good behaviour.

Sustaining it

8. **Sustaining the capability.** Whether new ways of working last, and keep improving, when people change roles.
9. **Knowledge and information.** What the business keeps and passes on.

Readiness for change

10. **Upgrade readiness.** How ready the business is to work in better ways.

DIAGNOSTIC

Portfolio Maturity Diagnostic for Contract Pharma

Portex Advisory

HOW IT IS SCORED

1 Ad hoc
Informal and dependent on individuals, so results vary.

2 Developing
Practices exist but are applied unevenly.

3 Managed
Documented and applied consistently, whoever holds the role.

4 Optimised
Embedded and self-correcting, so the business steers its portfolio rather than reacting to it.

Every area is rated for individual projects and across the portfolio. Readiness for change has its own four-level scale.

WHAT YOU GET

01 **One-page scorecard.**
Every area, with project and portfolio ratings side by side.

02 **Findings report.**
Area by area, with the evidence behind each rating.

03 **Leadership debrief.**
The priority gaps, where to focus first and an indicative roadmap.

WHEN TO THINK OF THE DIAGNOSTIC

- Your portfolio has grown or contracted, or your strategy, structure or leadership has changed, and you want to know how well your decision-making machinery still fits.
- You are planning a change to how the portfolio is run, and want to know where to start.
- Investors or your board want to see that portfolio decisions are consistently driving the greatest value.

WAYS TO START

Light Survey. Participants answer 20 questions on the 10 areas, and you receive a summary of findings and next steps.

Focused Diagnostic. We agree the priority areas with your leaders, then interview your people and review documents in those areas.

Full Diagnostic. All 10 areas, with interviews and document review, as this overview describes.

To see which fits your business, email **info@portexadvisory.com** and we will arrange a conversation.

ADVISED BY INDUSTRY AND ACADEMIA

- **Ed Couch**, Target State (formerly Executive Director, AstraZeneca)
- **Fraser Kerr**, Astute Pharma Associates
- **Nektarios Oraiopoulos**, Professor of Operations and Technology Management, University of Cambridge
- **Jochen Schlapp**, Professor of Operations and Technology Management, Frankfurt School of Finance & Management