Business Diagnostics User guide

A business health check across 8 pillars.

Version 1.3 · 21/11/2026

An Everaconsulting application · everaconsulting.vn

0. What is Business Diagnostics?

A company assesses itself with **24 questions** (quick version) or **64 questions** (full version) across 8 pillars. The programme scores the answers with fixed rules and gives a report straight away. You do not need to enter revenue, cash or salaries.

English and Vietnamese. The **VI | EN** button at the end of the top bar opens the page you are viewing in the other language (introduction, sample report, sign-in, My reports...). The language of the questions and the report is chosen when you start an assessment and stays the same for that assessment, including the VIP part, the OKR-KPI and Action plan tabs, the comparison report and every exported file (Word, PDF, PowerPoint, Excel). For a report in the other language, take a new assessment.

Code	Pillar	Code	Pillar
ST	Strategy and execution	**OR**	Structure and governance
FI	Finance and cash flow	**PE**	People and culture
CU	Customers and growth	**DT**	Data and technology
OP	Operations and quality	**RI**	Risk and adaptability

The 6-step journey

The programme works with the company like a health check-up, in a closed loop:

1. Diagnosis
24- or 64-question assessment, free report (sections 2, 3)

2. Treatment plan
In-depth analysis, 12-month targets, VIP package (sections 4, 5)

3. Plan
Tasks in 3 phases, Gantt chart, progress tracking (section 5)

4. KPI-OKR
KPI sheet for sign-off, Min, Target and Max thresholds (section 5)

5. Manage
Import the plan into FOCUS Work Plan (section 5)

6. Follow-up
Reassessment, before-and-after comparison report (section 8)

Free and VIP

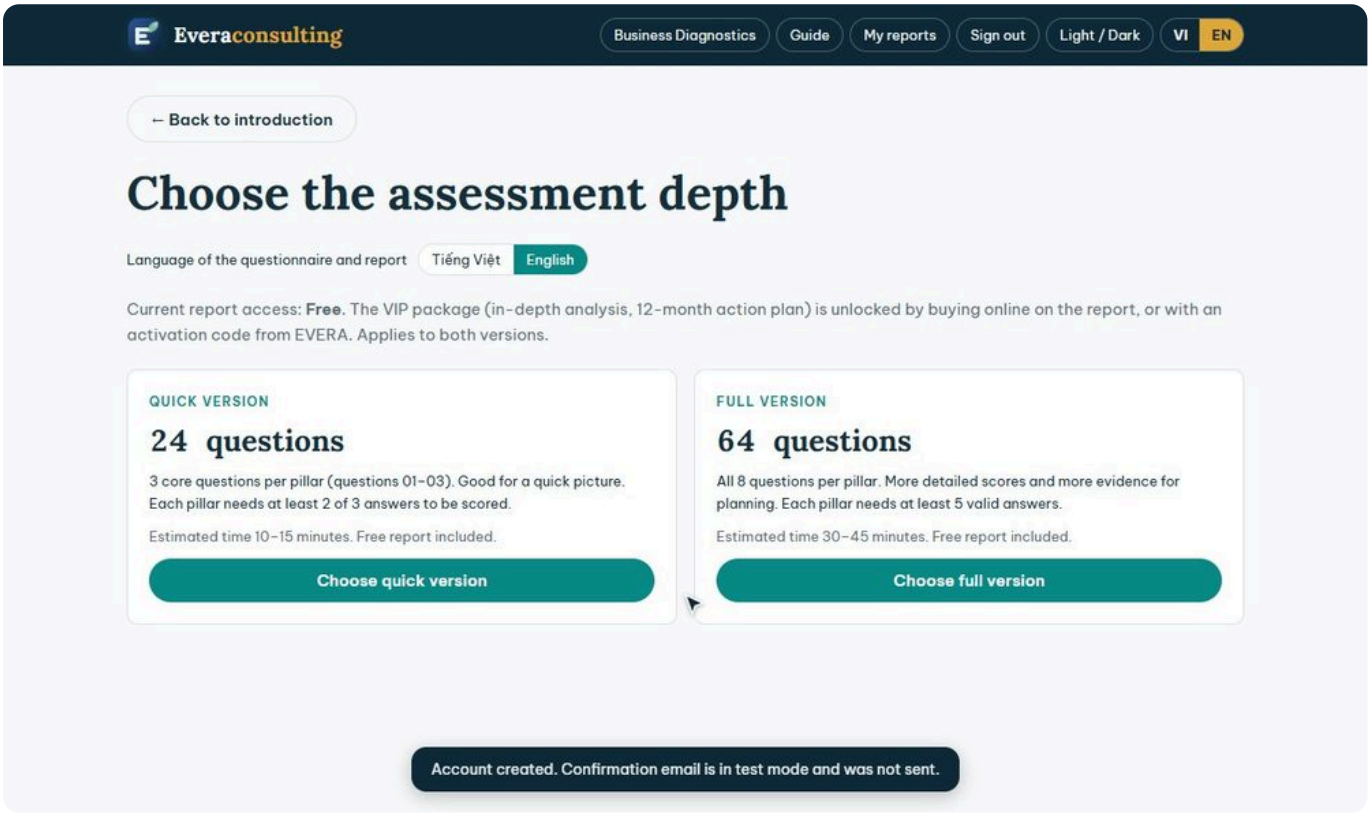
Content	Free	VIP package
Overall score, scores of the 8 pillars, strengths, gaps, alerts, comments	**Yes**	**Yes**
Export Word, PDF	**Yes**	**Yes**

Download the questions and answers (PDF)	When EVERA enables it	When EVERA enables it
In-depth analysis, cross-pillar themes	No	**Yes**
Targets and 12-month action plan, Gantt chart, priority matrix	No	**Yes**
OKR-KPI sheet, Action plan for sign-off, Excel import file for FOCUS Work Plan	No	**When EVERA enables it for the company**
Reassessment and before-and-after comparison report	No	**Yes**
PowerPoint presentation, technical dossier (PDF)	No	**When EVERA enables it for the company**

1. Getting started

Register an account

1. Go to the **Business Diagnostics** page, click **Start** or **Sign in**, then choose the **Register** tab.
2. Enter your full name, email and a password of at least 10 characters, then click **Create an account**.
3. Open your inbox and click the confirmation button in the email when convenient. If you cannot see the email, check the spam folder.



Create an account, then go to the page where you choose the version.

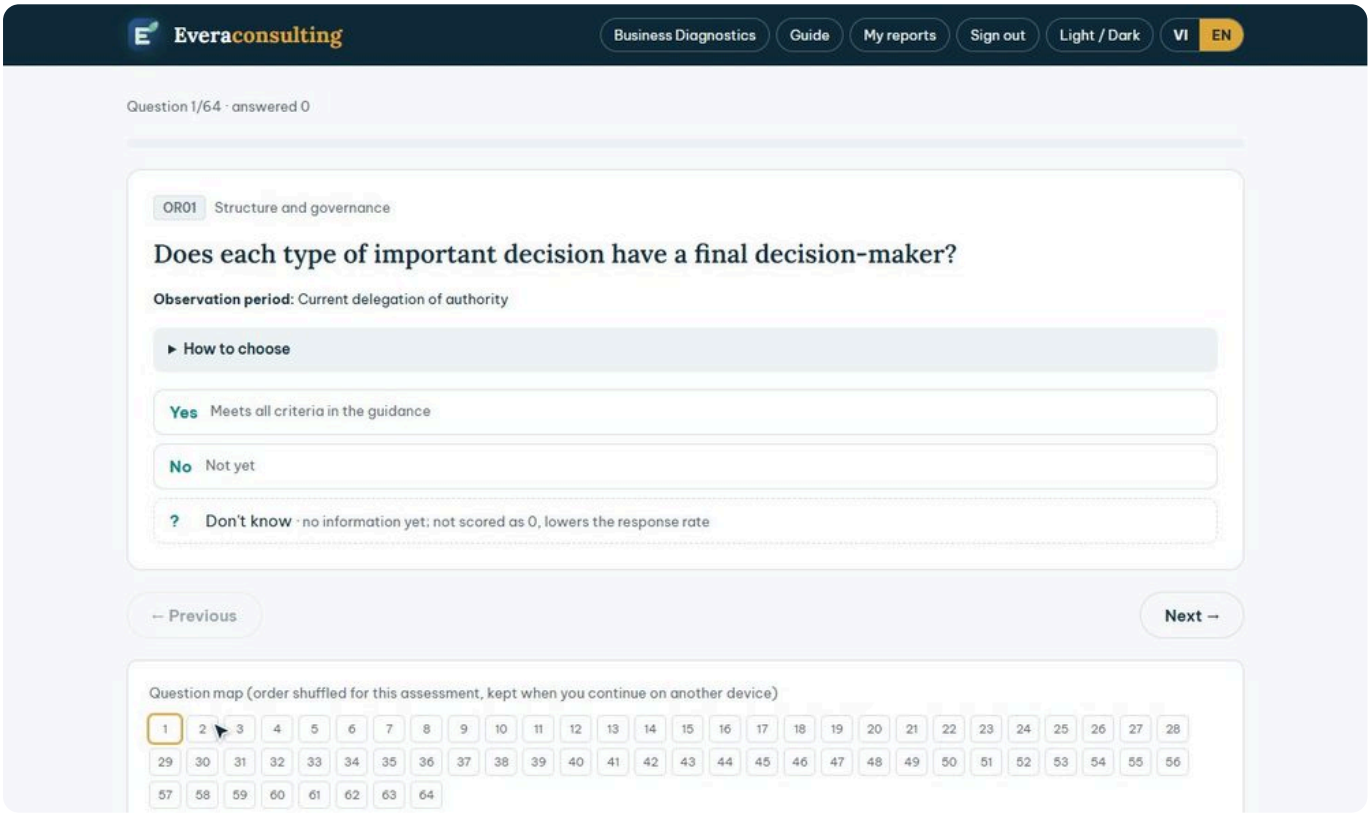
Sign in, forgotten password

Click **Sign in** and enter your email and password. If you forget your password, click **Forgot your password?**, enter your email and open the link in the email to set a new one.

2. Taking the assessment

Choose the version and confirm the scope

1. Choose the **quick version, 24 questions** (10–15 minutes) or the **full version, 64 questions** (30–45 minutes), and the language **English**.
2. Enter the display name, industry, headcount band, company age and customer model. Note the unit assessed and the assessment period.
3. Answer the **4 applicability confirmations**: do you sell on credit, do you rely on outside inputs that could be disrupted, will the structure change in the next 12 months, do you use or plan to use AI. If you choose **Not sure**, the related questions still have to be answered.
4. Click **Start answering**.



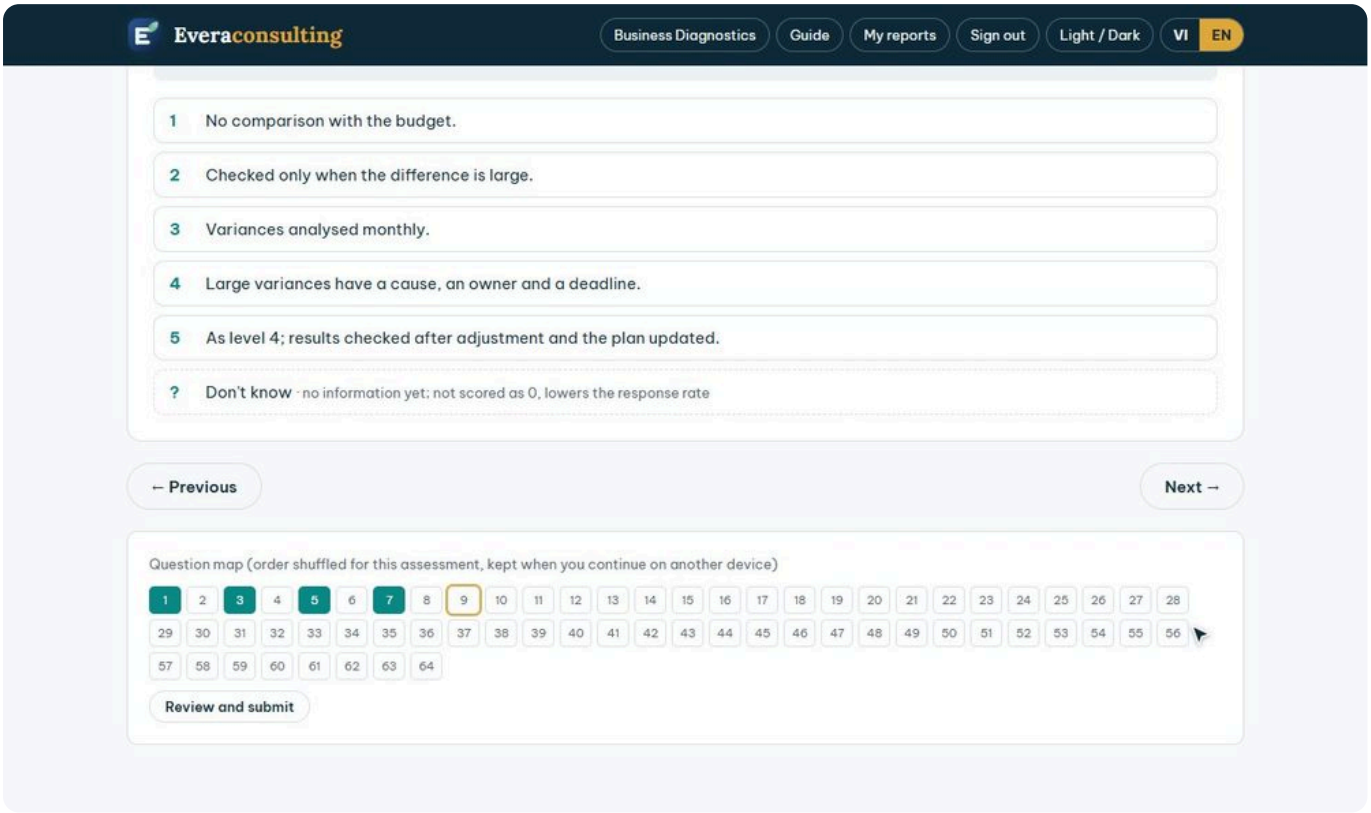
Choose the full version, enter the company profile and the 4 confirmations.

Answer the questions

- For each question choose **Yes, No** or **level 1 to 5**. Open **How to choose** to see when to choose Yes and what each level means.
- The programme saves automatically. You can continue on another device; the question order stays the same.
- Once you choose an answer, the programme **saves it and moves to the next question**, with a green line "✓ Saved…". You do not need to click **Next** →; the button is dimmed while

the current question has no answer (you can still click it to skip and come back later).

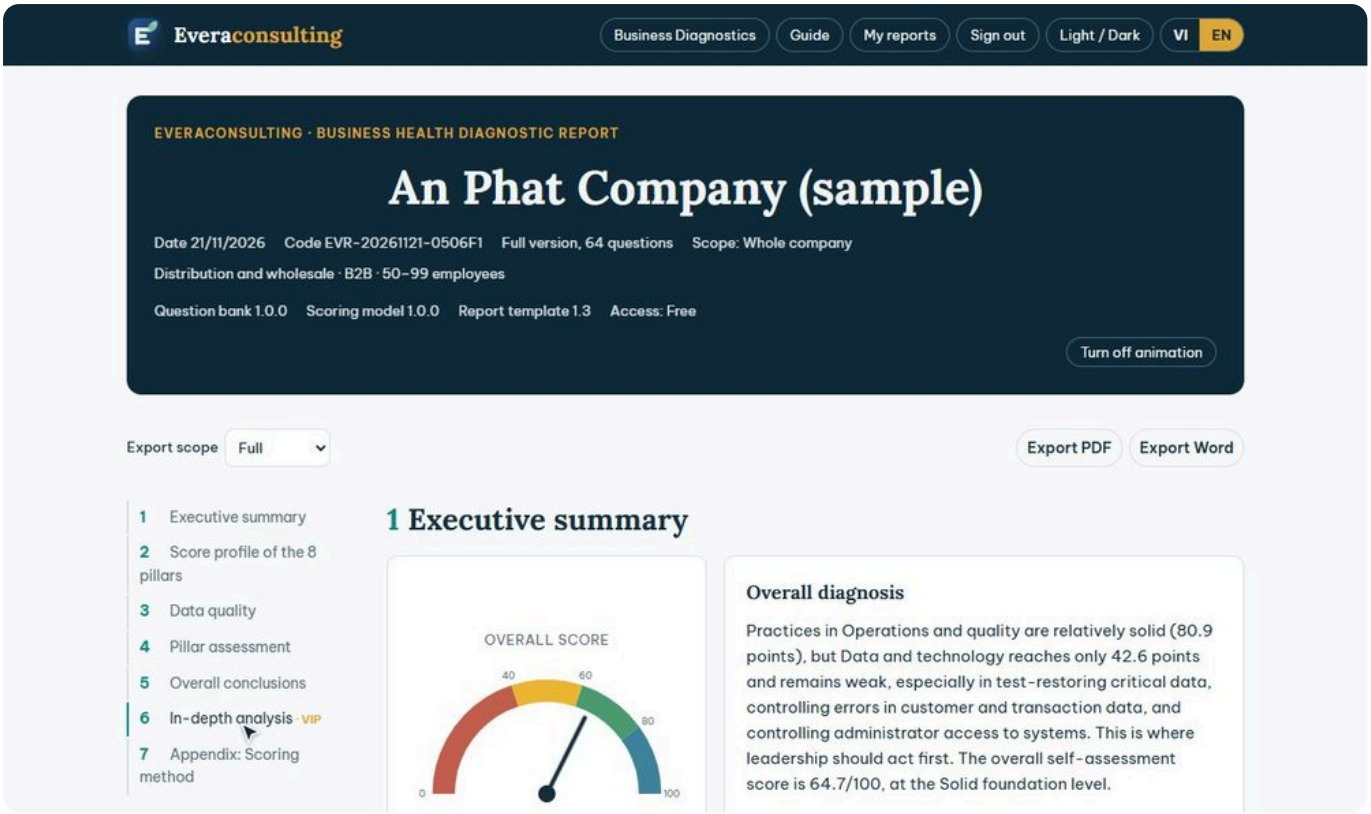
- The **question map** shows which questions are answered; click a number to jump to it.
- If you are unsure, choose **Don't know**: the question does not count as 0 points but lowers the data level of the pillar.
- While on the quick version you can click **Extend to the full version (+40 questions)**.



Choose an answer, move on, check the question map.

Review and submit

Click **Review and submit**. The screen lists unanswered questions and Don't know answers. Click **Submit and view report**.

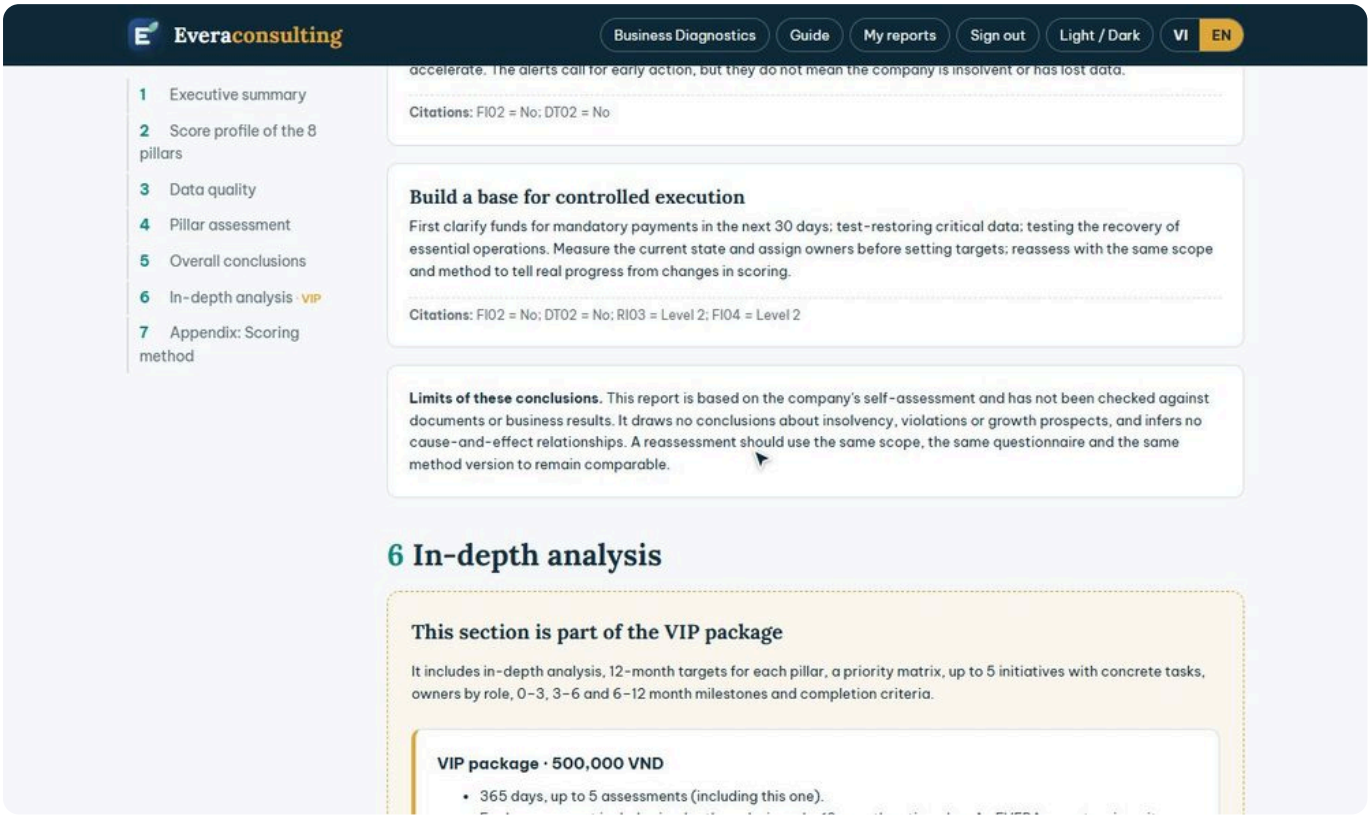


The report is ready as soon as you submit.

Note: a submitted assessment is locked and its answers cannot be changed. To update them, reassess (section 8).

3. Reading the free report

The report has a table of contents on the left: executive summary, score profile of the 8 pillars, data quality, pillar assessment, overall conclusions.



Scroll through the parts of the report.

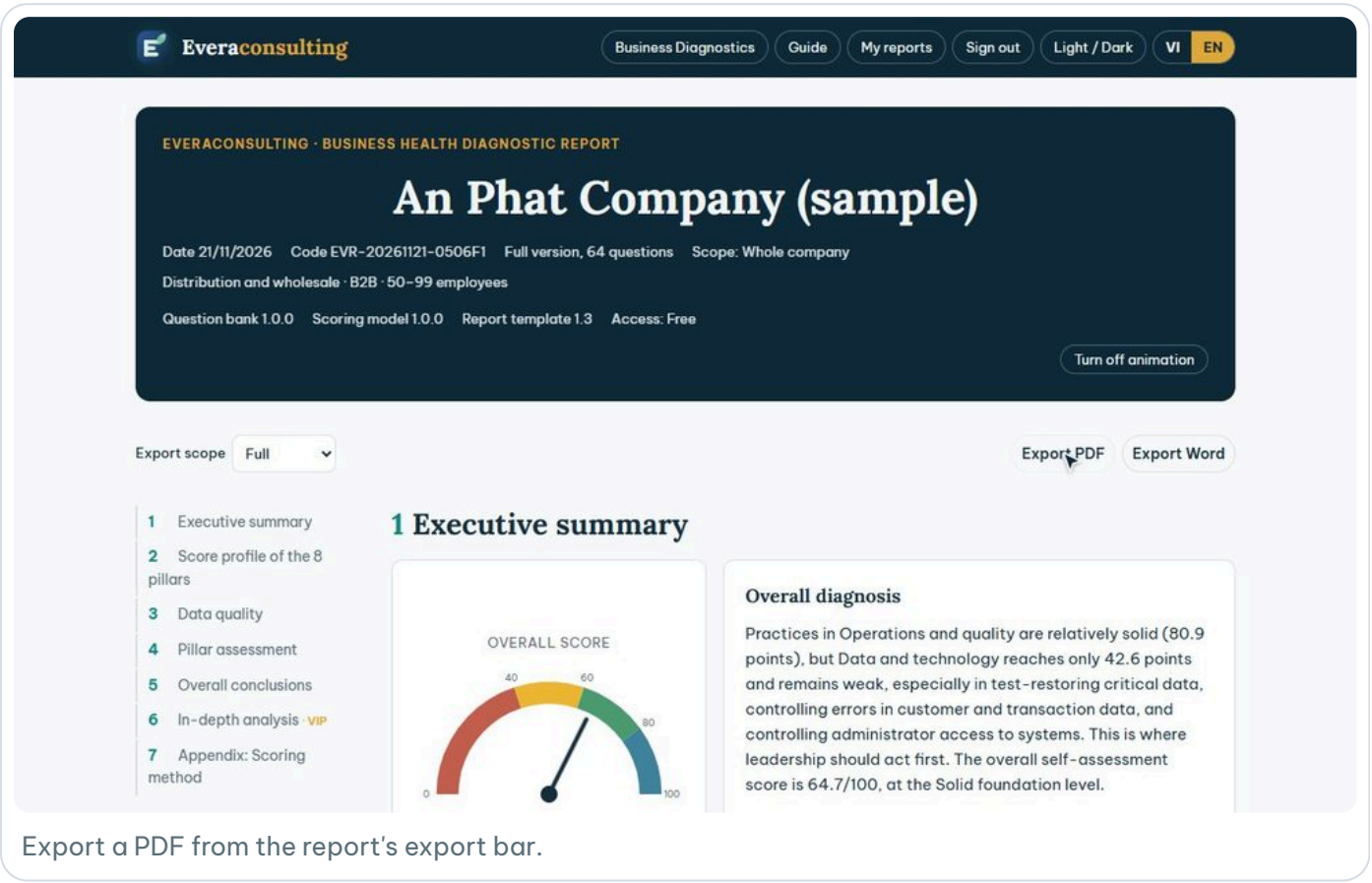
Assessment levels

Strong 80–100 **Solid foundation** 60 to under 80 **Needs strengthening** 40 to under 60 **Priority** under 40

- The **overall score** exists only when all 8 pillars have enough data.
- An **alert** is an item to verify, not a conclusion that the company has had an incident. Alerts can appear even when the score is high.
- **"Two answers do not yet match"**: one answer points to a weakness while a related question is at a high level, for example no list of 12-month priorities yet each priority has an owner. The report names both answers and what needs verifying, without concluding which one is wrong. If you answered by mistake, reassess to get a new report.
- The **analysis of each pillar** is written as paragraphs without codes. The **Citations** line below gives short references such as `ST01 = Yes` so you can look up the answer. The VIP package adds a **Based on** line with the task codes in the plan.

Export Word, PDF

On the export bar under the tabs, choose **Full** or **Summary** in **Export scope**, then click **Export Word** or **Export PDF**. In Chrome and Edge a dialog lets you choose where to save the file; other browsers download it as usual.



Export a PDF from the report's export bar.

Download your answers

To see what you chose, click **Download answers (PDF)** at the top of the report. The button appears only when EVERA has enabled the document for the company; if you cannot see it, contact EVERA. The table lists every question in full, the answer selected (levels 1–5 with their meaning), the respondent and the time. These are the answers locked at submission and used to score that report. When several people answer for a company, the **Respondent** column shows who chose each answer.

4. Opening the VIP package

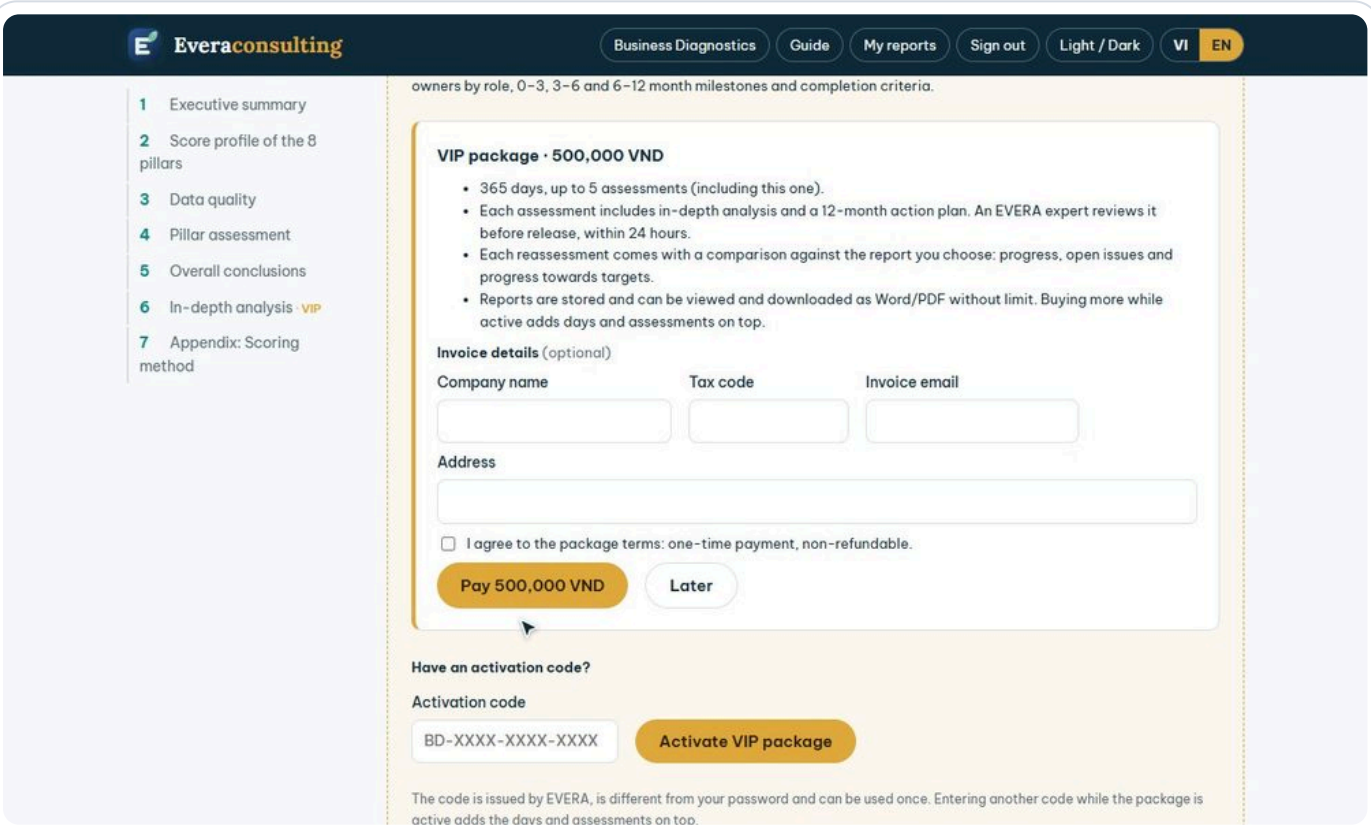
Account owner

Section **6. In-depth analysis** of the report offers two ways to open the package. Price, number of days and number of assessments follow the package programme at the time of purchase.

Buy online

1. Click **Upgrade to VIP**, read the package terms and enter invoice details if needed.
2. Scan the QR code with your banking app. Once paid, the screen updates by itself.

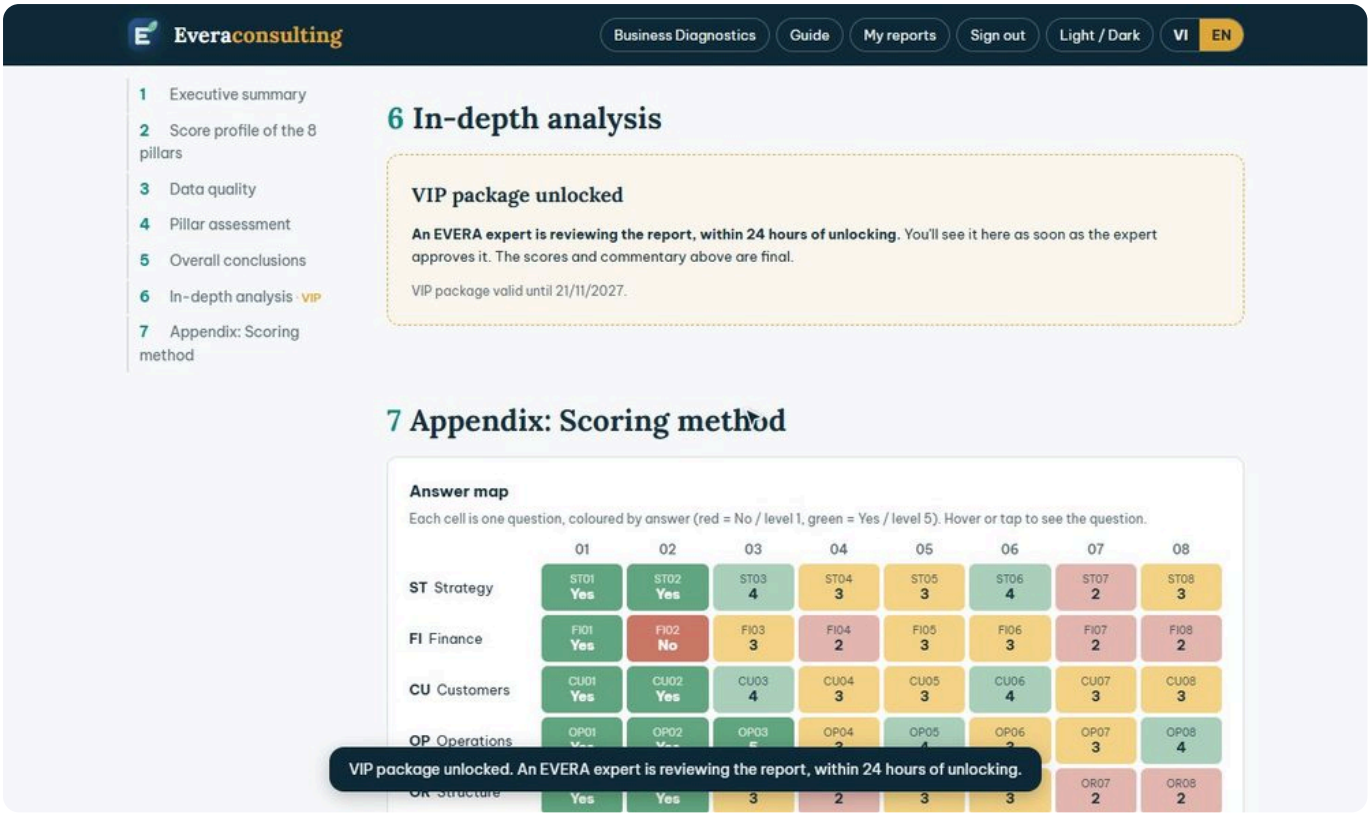
> Online payment uses QR bank transfer in Vietnamese dong. Companies outside Vietnam: contact EVERA for a contract and bank transfer; EVERA then issues an activation code.



Package information and the purchase form. Illustration only, no payment is made.

Enter an activation code

If EVERA gives you a code, sign in with the **account owner**'s account, enter it in the **Activation code** box and click **Activate VIP package**.



After the package opens, the report moves to review.

After the package opens, the screen says the report will open in a few minutes, or that **the report is being reviewed by an EVERA expert, with a reply within 24 hours**. You do not need to buy again or re-enter the code. When the report is ready, the account owner receives an email.

Already have a package: use an assessment, no need to buy again

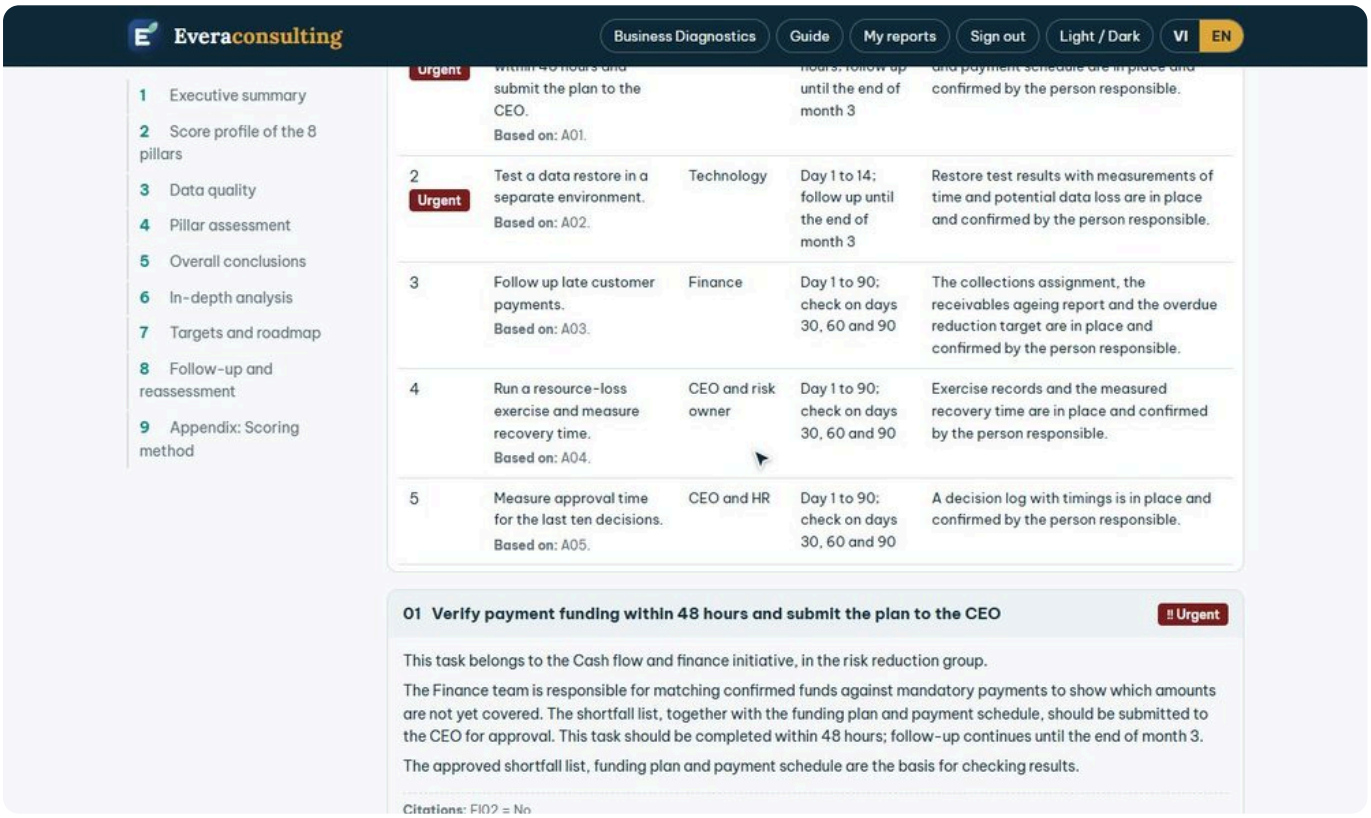
Each package includes several assessments. While the company has a package that is still valid and has assessments left:

- **New assessment** (click Take the assessment, choose quick or full): by default it is **a real assessment that uses the package**. The page says the assessment uses the company's VIP package and shows how many are left. An assessment is only used when you submit; abandoning a draft uses nothing. The new report has the in-depth analysis like the first one.
- **A report made outside the package** (before buying): open the report and, in section 6, click **Use 1 VIP assessment for this report**. Only the account owner sees this button.
- **Practice run:** on the start page, click **Practice run (does not use the package)** instead of Start answering. A practice run only has the free part and uses no assessment; you can hide it afterwards in My reports.
- For a **comparison report** with an earlier report, use **Reassess** (section 8) instead of a new assessment.

5. In-depth analysis and plan

When the report is approved, the account owner receives the email "Your VIP report is ready" with a button to open it, and sections 6 and 7 open. If an EVERA expert edits it later, the account owner receives an "updated by EVERA" email; Word or PDF files downloaded earlier are the old version, so export again.

- **In-depth analysis:** executive summary, analysis of each pillar, conclusions, cross-pillar themes, conditions for accelerating.
- **12-month targets:** current score and target for each pillar.
- **12-month action plan:** up to 16 tasks in 3 phases (months 1–3, 4–6, 7–12) with a Gantt chart. Urgent tasks come first.
- The **priority matrix** and the task table by pillar.



In-depth analysis and action plan. The content uses sample data.

> The company chooses the start and end dates of the plan. Bar positions on the Gantt chart show a suggested order, not a committed schedule.

Track plan progress

At the end of each task card in the plan there is a **progress** box. The account owner or a respondent chooses **Not started**, **In progress**, **Done** or **On hold**, adds a short note if they wish

(optional, no documents needed) and clicks **Save**. Above the plan, the bar **Progress: x/N tasks completed** shows the total; each task shows the date and person of the latest update.

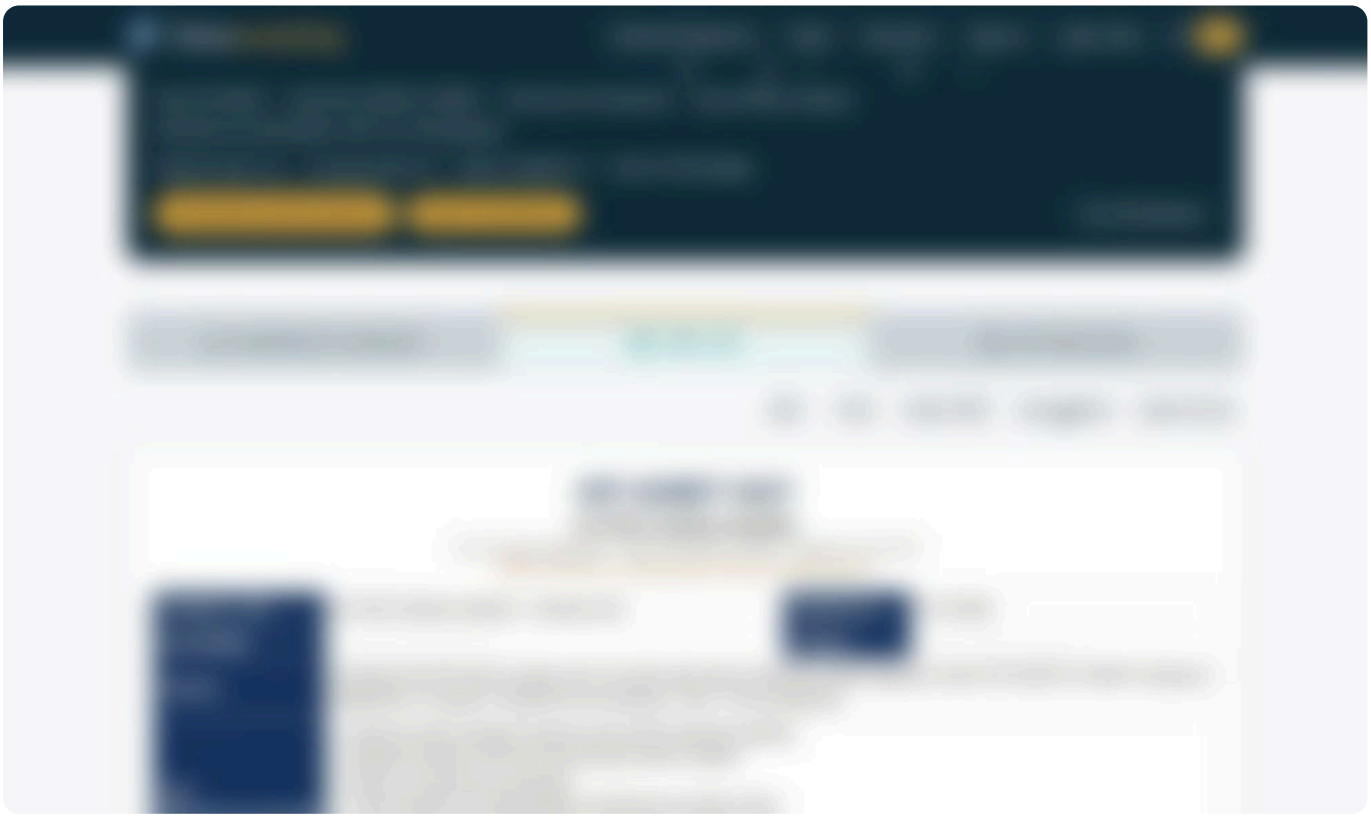
- Progress **does not change the score**. The score only changes with a reassessment.
- When you reassess, the comparison report uses the status the company entered and marks it **Confirmed by the company**. If an EVERA expert adjusts it during review, the row says **Updated by an EVERA expert**.
- Viewers and EVERA can only view progress, not change it for the company.

OKR-KPI and Action plan

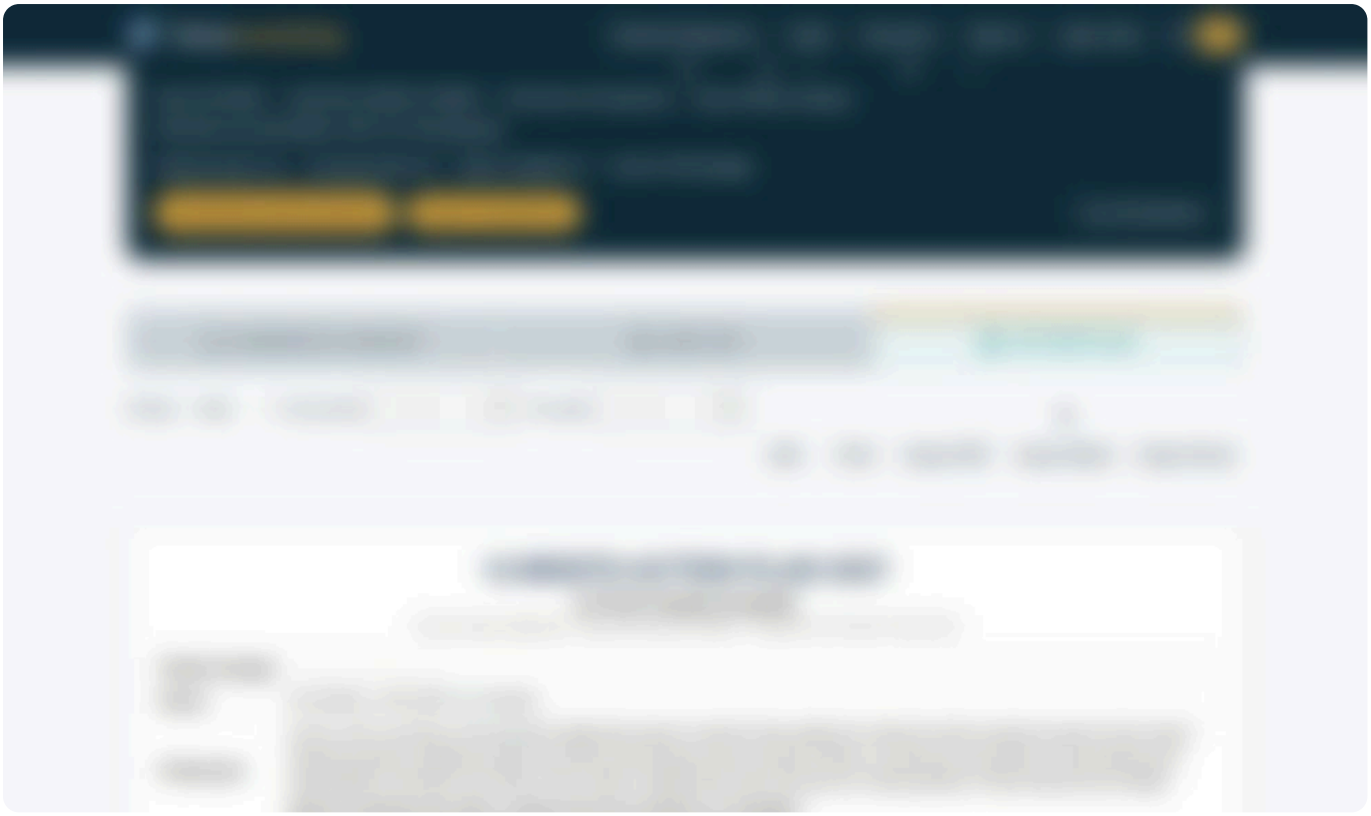
For VIP clients, EVERA can open two more tabs just under the report header: **OKR-KPI** and **Action plan**. **EVERA opens these tabs for each company**; if you need them and cannot see them, contact EVERA. Click **Diagnostic report** to return to the report. To preview them, open the sample report and click OKR-KPI or Action plan (view only).

Both tabs are laid out like a printed sign-off copy: **OKR-KPI** has the objectives (OKR), strategies, KPIs with weights and Min, Target and Max thresholds; **Action plan** has every task with owner, department, priority, dates, status, a time grid and RACI. The company edits, prints, exports PDF, Word and Excel, and imports straight into FOCUS Work Plan.

The images below are blurred. **Sign in** to see the full guide for this part: editing the KPI table, suggested weights, adding, deleting and moving tasks, restoring the original. Sign in



OKR-KPI tab (blurred image).



Action plan tab (blurred image).

Import the plan into FOCUS Work Plan

To assign work to real people and track it daily, take the plan to **FOCUS Work Plan**, EVERA's work management programme:

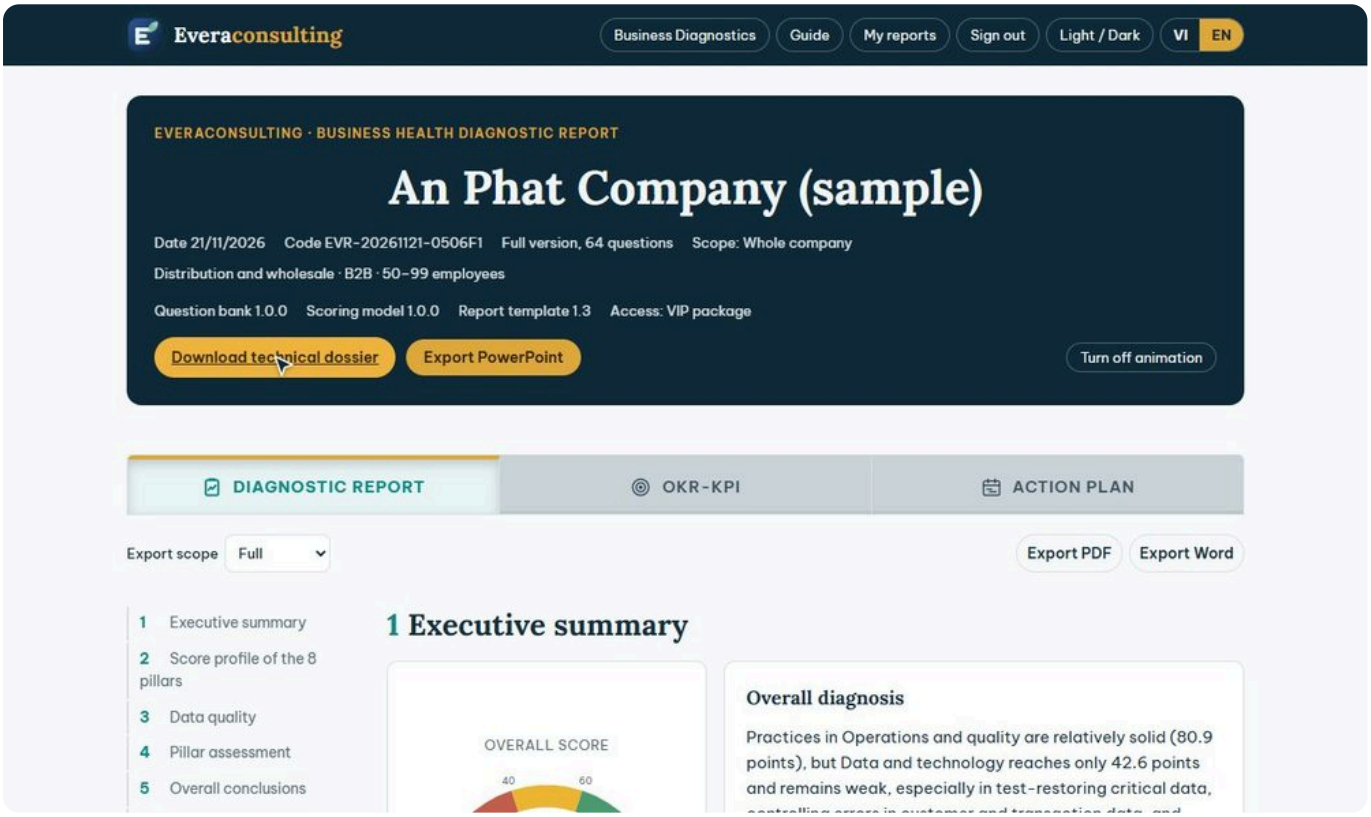
1. On the **Action plan** tab, click **Export Excel** to download the FOCUS import file.
2. In FOCUS, an Owner or Admin account clicks **+ Create new project**, then **Import plan from Excel**, and chooses the file. FOCUS checks it first without saving anything and reports any row with an error.
3. On the preview screen, edit the project name if needed and choose a real person for each role, or leave it blank to assign later.
4. Create the project. Each task group becomes a **Key** and each task a work item, with start dates and deadlines from the plan. From then on, assign, edit and track it on the Master Plan like any project.

Each import creates a new project; it does not update an old one. If the plan in Business Diagnostics changes a lot, download a new file and import it as a new project, or edit directly in FOCUS. See the FOCUS user guide for details.

6. Presentation, technical dossier

EVERA **enables these documents for each company**. Once enabled, the report header shows the buttons. Viewers cannot download them.

- **Export PowerPoint:** a presentation for the executive team with charts and figures from the approved report. Charts can be edited in PowerPoint. When the OKR-KPI and Action plan tabs are open, the deck also has pages for the objectives (OKR) and strategies, KPI weights by pillar, the KPI table and the action plan timeline with real dates, taken from the version you are viewing (including your edits). Available only once the report is approved.
- **Download technical dossier:** a PDF explaining the method, the process and how to check the results yourself. The English version of the dossier is being prepared; until then the button downloads the Vietnamese version.



The Export PowerPoint and Download technical dossier buttons once enabled.

If you need them and cannot see the buttons, contact EVERA.

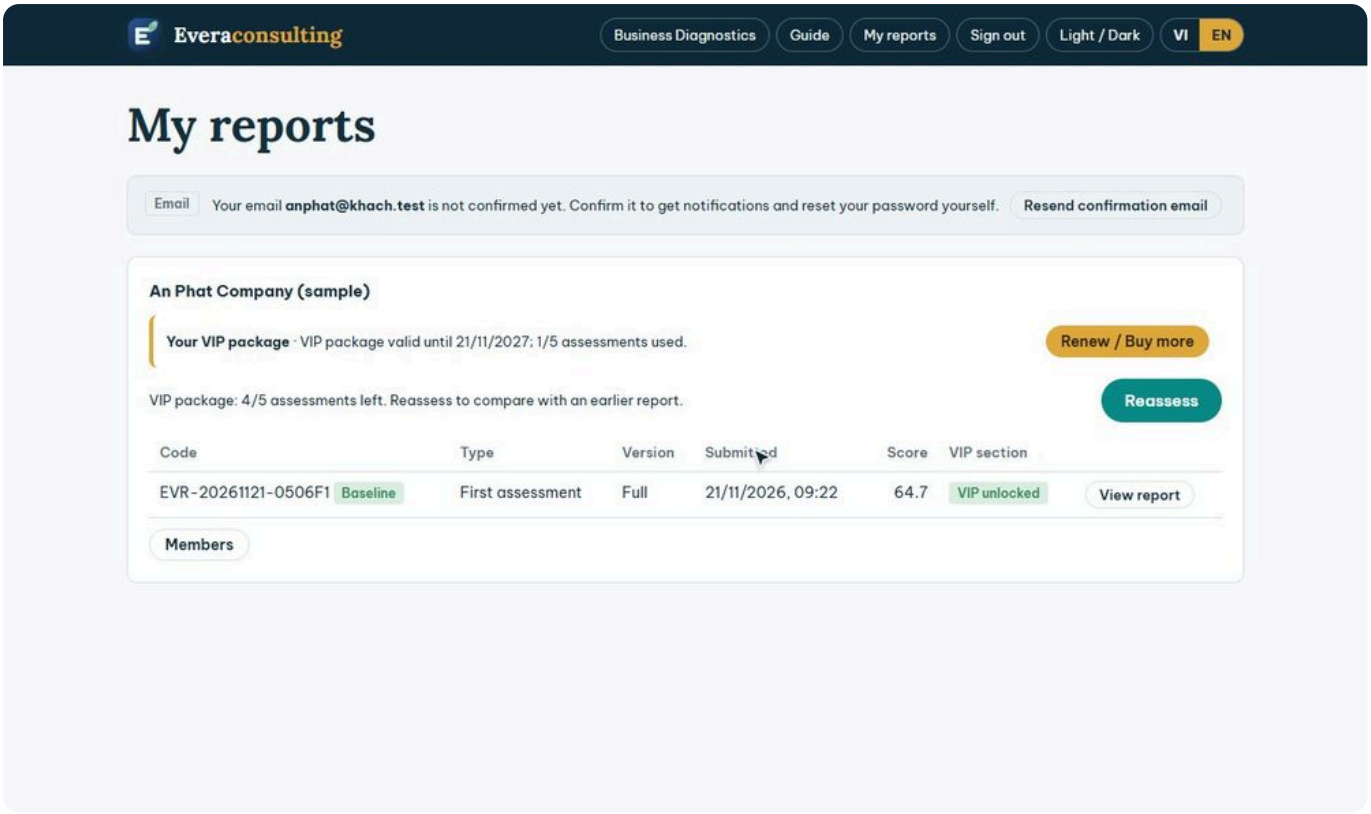
7. My reports, renewal, members

The **My reports** page lists the companies, submitted reports, assessments in progress and the line **Your VIP package** (valid until which date, how many assessments used). Each report shows its code, submission time, **type** (First assessment, New assessment in package, Practice run, or **Comparison report 1, 2…** with a small "compared with" line naming the original report and its date) and its **VIP part** (Free, Being prepared, Awaiting EVERA review, VIP open, Package expired) so you can tell old and new reports apart. When you open a comparison report, a small line under the company name says which round is compared with which report.

Baseline report: the report used as the reference point, marked **Baseline**. The list shows the newest report first by default; the **Sort** box above the table switches to oldest first, highest to lowest score, or baseline first. By default the baseline is the first VIP report; the account owner clicks **Set as baseline** on another report to change it. The baseline cannot be hidden; to hide it, set another baseline first.

Hide practice reports: for reports made to get familiar or not taken seriously, the account owner clicks **Hide report** on that row so the list only keeps reports used for analysis. Hiding deletes nothing and does not give back a package assessment already used. To get a hidden report back, contact EVERA. Renew here when needed; buying more while the package is valid adds the days and assessments to the current package.

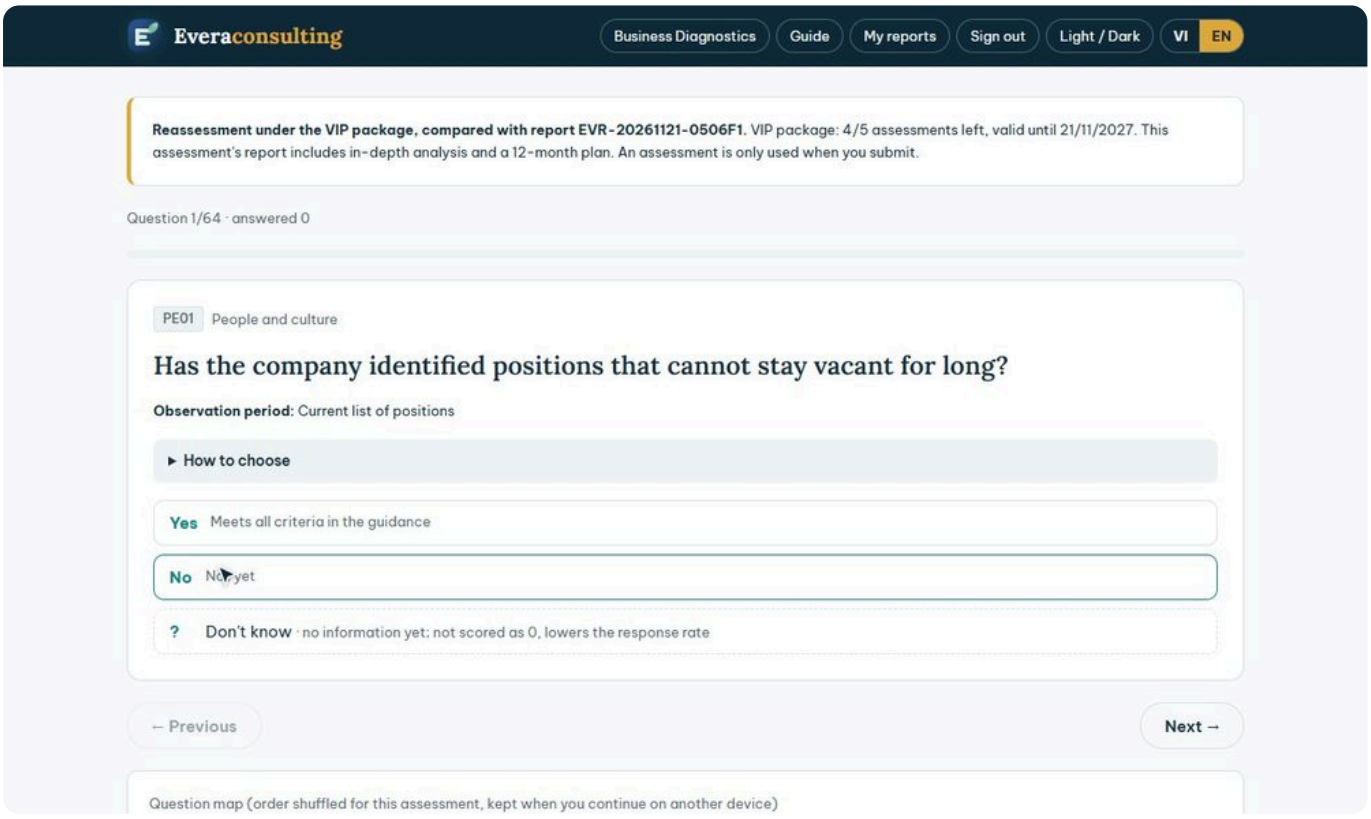
Invite members: the account owner clicks **Members** under the company name, enters an email and chooses the role **Respondent** (takes the assessment, views reports) or **Viewer** (only views reports), then clicks **Invite**. People who already have an account join straight away. People without an account receive an invitation email, sign in or create an account with that exact email and click **Accept invitation**; the invitation is valid for 14 days. The account owner changes roles, removes members or cancels invitations in the same place.



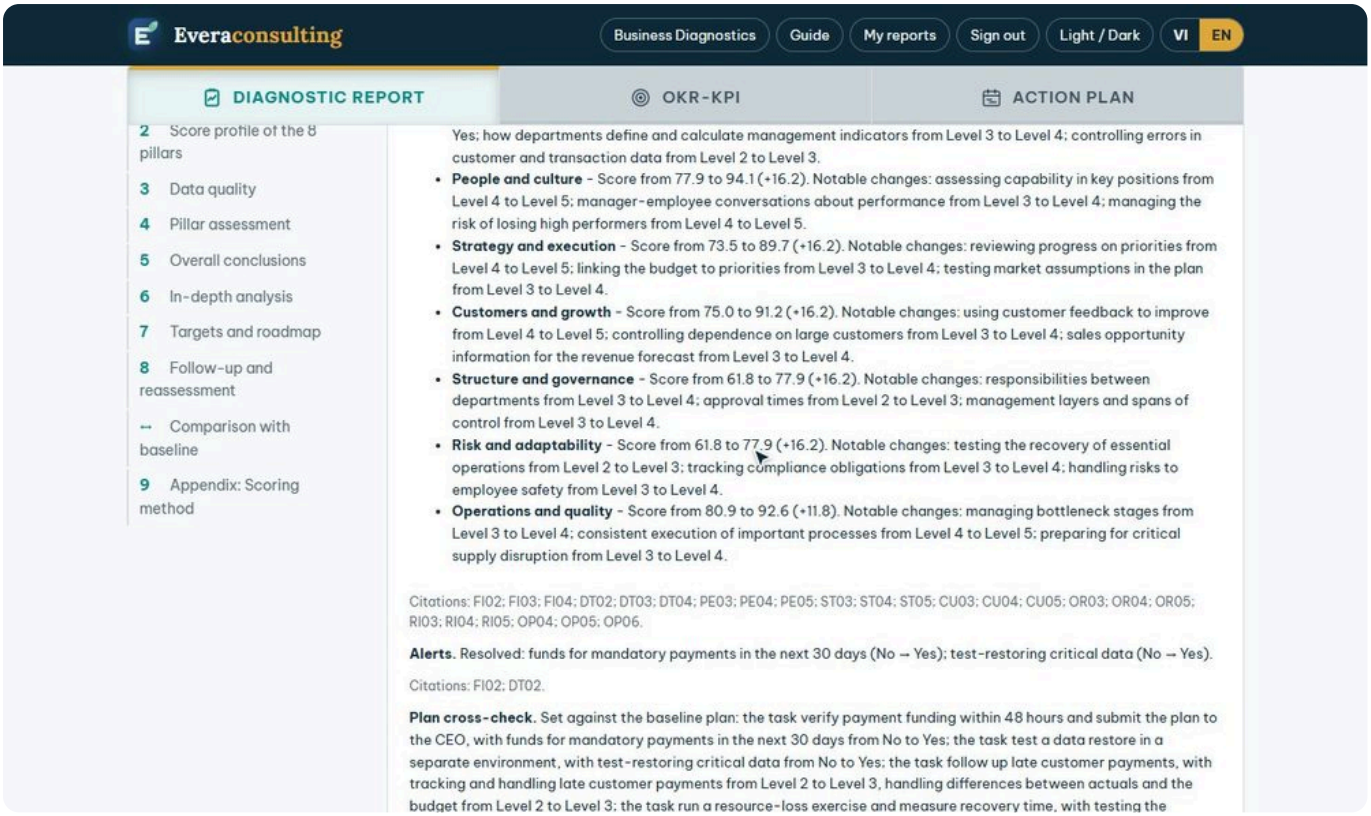
See every report and the package status.

8. Reassessment, comparison report

1. After some time carrying out the plan, go to **My reports** and click **Reassess** (under the Your VIP package line). The button also appears at the end of the plan in the VIP report. It shows only for the account owner when the company's package is still valid and has assessments left; each package has a set number of assessments, and one is only used when you submit.
2. In **Compare with report**, choose the report to compare with. The programme suggests the latest VIP report; you can switch to the baseline or another report. Choose **No comparison (new assessment in package)** if you only want a new assessment. Click **Start**.
3. Answer again and submit as before. The new assessment uses the same version (quick or full) and scope as the selected report. The new report has its own analysis.
4. Once approved, the new report has a **comparison with the selected report**: score differences, question-level changes, alerts resolved or newly raised, and progress of that report's plan. Each point of progress says what **the follow-up answers record** and **which document to check**: both rounds are self-assessments, so changes should be checked against documents before they are used to report upwards or externally. The **Export comparison Word** and **Export comparison PDF** buttons are at the end of the "Comparison with the baseline" section. The comparison report is in the language of the follow-up round.



Click Reassess in My reports, choose the report to compare with, then start.



The before-and-after comparison. The report places changes next to progress and does not claim causes.

9. Frequently asked questions

Question	Answer
Why is there no overall score?	Some pillars do not have enough data. The quick version needs at least 2 of the 3 questions in each pillar; the full version needs at least 5 questions and 70% of the weight.
What if I answered wrongly after submitting?	A submitted assessment cannot be edited. Reassess if the package has assessments left, or contact EVERA.
Does the report compare with companies in the same industry?	No. The report does not compare with industry benchmarks and does not rank companies.
Is the data verified?	It is a self-assessment, not yet checked against documents. Verify the important items before making major decisions.
With a package, does a new assessment cost more?	No. A new assessment uses one assessment of the package, only when you submit. When the package runs out or expires, new reports only have the free part; renew in My reports.
The package is open but I cannot see the analysis.	The report is being reviewed by an EVERA expert, with a reply within 24 hours. If it takes longer, contact EVERA.
What happens when the package expires?	The VIP part is locked until you renew. The free part stays visible.
Can I have the report in Vietnamese?	The language is fixed for each assessment. Take a new assessment and choose Tiếng Việt at the start.

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