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The Forrester Wave™: Value Stream Management Solutions, Q3 2020

The 11 Providers That Matter Most And How They Stack Up

by Christopher Condo
July 15, 2020

Why Read This Report

In our 30-criterion evaluation of value stream management (VSM) providers, we identified the 11 most significant ones — Atlassian, Blueprint, CloudBees, ConnectALL, Digital.ai, GitLab, IBM, Plutora, ServiceNow, Targetprocess, and Tasktop — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals select the right one for their needs.

Key Takeaways

Digital.ai, ServiceNow, Tasktop, And Plutora Lead This Growing Market
Forrester's continued research into VSM showed a market in which Digital.ai, ServiceNow, Tasktop, and Plutora are Leaders; Targetprocess, IBM, ConnectALL, and CloudBees are Strong Performers; and Atlassian, GitLab, and Blueprint are Contenders.

Metrics And KPIs, Data Analytics, Governance, And Compliance Are Important Differentiators
As larger enterprises modernize software delivery practices, leading VSM vendors respond by providing required capabilities such as metrics and key performance indicators (KPIs), analytics, automated governance, and compliance. These help software teams plan, build, and release software more effectively with greater impact on their business. Vendors that provide these capabilities at scale and continue to innovate will lead this market moving forward.

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July 15, 2020

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VSM Vendors With Breadth And Depth Lead Our Evaluation

When we published our first VSM evaluation in 2017, few AD&D leaders had heard of VSM; since then, the VSM tools market has evolved rapidly as have prospective buyers of VSM tools.[1] AD&D planners, engineers, and release experts understand VSM and want it to help them plan, create, and deliver software experiences that align to both the business's and customers' needs. In fact, 33% of development managers tell us that collecting and integrating more feedback from users and speeding release and cycle times are among their top three priorities.[2] Smart AD&D leaders know they can't improve their processes without data. VSM gives them the data they need to create baselines of current software delivery practices and set a path for improvement across each role of the AD&D organization.

Strong interest in VSM is driven primarily by three roles: 1) product owners and/or program managers who need data to help drive strategies, set priorities, and unlock team potential; 2) development leaders who use VSM to create connected, automated, and self-governed CI/CD pipelines with observability for improving and accelerating the pace of delivery; and 3) release engineers who use VSM for governance, compliance, and upstream observability to manage risk.[3] To serve these roles effectively, customers should look for offerings that demonstrate both breadth and depth of functionality and:

› **Provide useful and extensible OOTB metrics to create a system of visibility.** AD&D leaders often need a crystal ball to predict software delivery dates and discern process trends, but that's not good enough anymore. Look for VSM tools with out-of-the-box (OOTB) metrics that inform leaders on velocity, capacity, types of work being processed, and work in progress to enable leaders to create baselines and determine how well they are executing against plan.

› **Go beyond metrics by providing deep analytics.** Leading vendors Digital.ai, ServiceNow, and Tasktop take metrics to the next level with analytical engines that allow what-if analysis to help leaders test ideas and hypotheses for removing bottlenecks and increasing throughput. Other types of analytics include flow analysis and correlations between events and changes to KPIs. These help leaders understand not only what changed but also what events may have caused that change. As one reference customer noted: "We came to realize that gauging success using velocity was misleading and taking us in the wrong direction. Now we use flow metrics and base our success on delivering value."

› **Mesh DevOps data with policies to create automated governance and compliance.** All AD&D leaders should welcome the ability to place guardrails on software development that also help speed software delivery. As one ServiceNow client from a EU bank told us: "In the past, our policy engine did nothing but require manual steps to enter approval data. However, with VSM, we are now able to marry the data from DevOps with our policy engine to create automated governance. It enables a fully automated CD pipeline." With VSM DevOps, operations become the evidence that satisfies those policies.

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› **Emphasize innovation.** VSM is still a nascent category; customers' needs and vendors' innovation to meet those needs will drive its evolution. Innovations such as simulation engines to improve what-if analysis, analytical tools to help correlate events with outcomes, investments in architecture to enable VSM at scale, and investments in AI plus machine learning (ML) to augment decision making are important steps that will progress VSM tools forward.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about VSM products in our Now Tech report, which includes other relevant players in this market.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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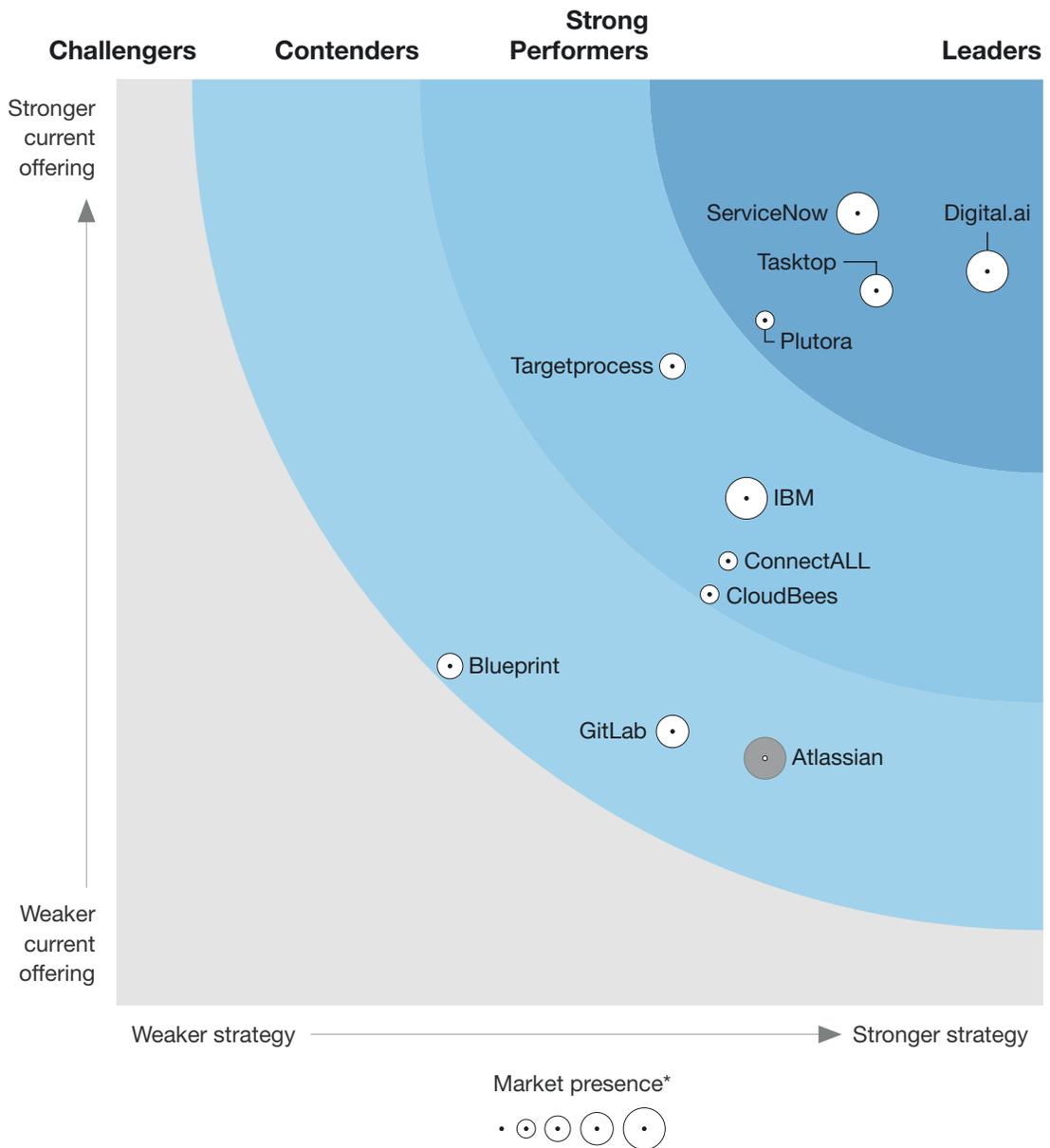The 11 Providers That Matter Most And How They Stack Up

FIGURE 1 Forrester Wave™: Value Stream Management Solutions, Q3 2020

THE FORRESTER WAVE™

Value Stream Management Solutions

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*A gray bubble indicates a nonparticipating vendor.

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FIGURE 2 Forrester Wave™: Value Stream Management Solutions Scorecard, Q3 2020

	Forrester's weighting	Atlassian*	Blueprint	CloudBees	ConnectALL	Digital.ai	GitLab	IBM	Plutora	ServiceNow	Targetprocess	Tasktop
Current offering	50%	1.34	1.83	2.22	2.40	3.96	1.48	2.74	3.70	4.28	3.45	3.86
Tool integration/interoperability	10%	1.60	1.00	1.80	5.00	3.80	1.40	3.80	3.00	4.60	2.20	4.20
Common data model	10%	1.00	2.00	3.00	3.00	3.00	1.00	4.00	5.00	4.00	3.00	5.00
Mapping people, process, and data	20%	2.00	3.00	3.00	3.00	4.00	2.00	3.00	4.00	3.00	4.00	5.00
KPI data capture and measurement	10%	0.67	0.67	3.00	1.68	4.34	1.68	3.00	5.00	4.34	3.66	4.34
Governance and compliance	10%	0.00	4.00	1.50	2.00	5.00	2.00	3.00	4.00	5.00	3.00	1.00
Data analytics and analysis	10%	1.33	1.66	1.35	1.35	5.00	1.00	2.34	3.00	4.34	3.66	4.34
Financials and budgets	10%	1.00	1.00	0.00	1.00	3.00	0.00	0.00	3.00	5.00	5.00	1.00
Dashboards and visualization	10%	0.75	1.00	2.50	1.00	4.50	0.75	2.25	3.00	4.50	3.00	3.75
VSM solution model	10%	3.00	1.00	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	5.00
Strategy	50%	3.50	1.80	3.20	3.30	4.70	3.00	3.40	3.50	4.00	3.00	4.10
Product vision	15%	5.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	3.00	5.00	5.00
Execution roadmap	10%	3.00	1.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00	5.00
Performance	15%	5.00	1.00	3.00	5.00	5.00	5.00	3.00	3.00	3.00	1.00	5.00
Planned enhancements	15%	1.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00	3.00
Innovation roadmap	15%	3.00	1.00	3.00	3.00	3.00	1.00	3.00	5.00	5.00	3.00	5.00
Partner ecosystem	10%	5.00	3.00	5.00	3.00	5.00	3.00	3.00	5.00	5.00	3.00	3.00
Commercial model	20%	3.00	1.00	3.00	3.00	5.00	3.00	5.00	3.00	3.00	3.00	3.00
Market presence	0%	4.50	3.00	1.50	1.50	4.50	4.00	4.50	1.50	4.50	2.50	3.50
VSM revenue	25%	5.00	3.00	3.00	1.00	5.00	5.00	3.00	1.00	5.00	1.00	3.00
Number of enterprise customers	25%	5.00	3.00	1.00	3.00	5.00	5.00	5.00	1.00	5.00	3.00	5.00
Average deal size	25%	3.00	5.00	1.00	1.00	3.00	1.00	5.00	3.00	3.00	1.00	1.00
Number of live installations	25%	5.00	1.00	1.00	1.00	5.00	5.00	5.00	1.00	5.00	5.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

*Indicates a nonparticipating vendor

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Vendor Offerings

Forrester included 11 vendors in this assessment: Atlassian, Blueprint, CloudBees, ConnectALL, Digital.ai, GitLab, IBM, Plutora, ServiceNow, Targetprocess, and Tasktop (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Atlassian	Jira Align	N/A: SaaS
CloudBees	CloudBees Value Stream Management	N/A: SaaS
ConnectALL	ConnectALL Integration Platform	2.10
Blueprint	Storyteller	5
Digital.ai	Digital.ai Value Stream Platform (CollabNet VersionOne, XebiaLabs, and Arxan)	CollabNet VersionOne VS 20.1, XebiaLabs 9.6, and Arxan for Web 3.2
GitLab	GitLab	12.10
IBM	IBM UrbanCode Velocity	1.5.x
Plutora	Plutora Platform	N/A: SaaS
ServiceNow	ServiceNow DevOps and ServiceNow IT Business Management (ITBM)	ServiceNow DevOps 1.13 and ServiceNow ITBM — Orlando
Targetprocess	Targetprocess	v.3.13.14
Tasktop	Tasktop Viz and Tasktop Hub	Tasktop Viz (SaaS) and Tasktop Hub 20.2

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **Digital.ai leads with a new name, bold strategy, and new leadership.** Digital.ai is a new company that resulted from the merger of CollabNet VersionOne, XebiaLabs (both Strong Performers in our previous VSM Wave), and Arxan Technologies (application protection), which were all part of the vendor's plan to create a complete end-to-end toolchain. The offering features numerous OOTB metrics, KPIs, and analytics, which are easy to configure and customize. Digital. ai utilizes Monte Carlo simulation to enable what-if analysis based on data collected in the common data model. The VSM dashboard provides a modern and easy-to-navigate UI and integrated value delivery metrics, giving product owners, planners, and creators actionable visibility into their software delivery processes.

Digital.ai provides OOTB Scaled Agile Framework (SAFe) templates to give organizations adopting SAFe a head start. As one large logistics customer noted, "Digital.ai's ability to scale to the enterprise allowed us to align with SAFe." Digital.ai also has a product strategy that aligns well with customers' needs. Reference customers remarked that Digital.ai is highly collaborative, working with them to build needed capabilities into the platform. Enterprise clients with large software organizations will see much value in Digital.ai's support for SAFe and its ability to scale VSM to the enterprise.

› **ServiceNow delivers a winning combination, leading with strong governance.** ServiceNow, a Leader in IT change management, is now a Leader in the VSM market. ServiceNow's very strong governance and compliance capabilities enable users (even in highly regulated industries) to create a system of continuous deployment by automatically connecting ServiceNow's digital policies with evidence captured from DevOps tools to create a system of automated governance. Its strong compliance capabilities feature support for automated audits and full traceability, enabling clients to automate change approvals and in turn minimizing the need for manual change approvals, to further enable fully automated deployments.

ServiceNow comes with numerous OOTB metrics and provides ample support for extending and customizing those metrics with an end-user-friendly UI. Its ability to connect and display financial information was also impressive. Reference customers with complex toolchains truly appreciated the capabilities that ServiceNow delivered. As one aerospace customer remarked, "ServiceNow gives us a single pane of glass to oversee new pipelines and correlate data sources to help us deliver software." Mapping and product vision were not as strong as others in those respective criteria. Customers in regulated and/or complex industries that want actionable visibility into their software delivery processes and achieve greater software delivery automation will well suit this offering.

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› **Tasktop's innovative dashboard and Flow Metrics win customers over.** Tasktop Viz is a new offering since our last evaluation. Its dashboard is engaging and provides value stream insight and visibility at a glance, enabling users to uncover areas of waste and create plans that target improvement. Where many vendors feature output metrics such as cycle time and mean-time-to-recover (MTTR), Tasktop created a new set of metrics it calls Flow Metrics, which Tasktop claims provide greater insight and guidance for optimizing software development processes. It's worth noting that several competing vendors see the value of Flow Metrics and have included those on their product roadmaps. In addition to Flow Metrics, Viz featured strong and differentiating what-if predictive analytics to enable planners and leaders to experiment with different models before putting plans into motion.

Viz users get more than 60 ready-to-use connections to a variety of software development automation tools for each phase of application development. Customer references had very positive comments regarding Flow Metrics, with one customer noting that using Viz elevated its approach to VSM to truly focus on delivering outcomes. Areas for improvement include governance and compliance, which are capabilities that Tasktop believes are best left to domain-specific tools. Clients that are shifting from a project-led to a product-led methodology and shifting their focus to outcomes should strongly consider Tasktop Viz.

› **Plutora provides great release plan visibility but needs stronger analytics.** Plutora's release-calendar view produces stacked bar charts that clearly display the date, impact, and stories for release on any given date on an easy-to-read time chart. Its common data model is strong and provides excellent extensibility, which embedded low-code tooling enables. In addition, Plutora offers strong governance capability, allowing it to command complex workflows. The vendor also has ambitious plans to recreate its offering with more scalable architecture and stronger and deeper analytical capabilities.

Reference customers had positive comments regarding the inclusion of Tableau with this product to enable deeper analytics. But this means the analytics are separate from the dashboard, and a more integrated experience would be preferable. Customers also said that the APIs are straightforward and that using Plutora to connect their various toolchains has given them new visibility into their disparate processes. As one customer noted, "We are using Plutora to control a very large estate with fewer people; we can now control more with less." Clients that are looking to combine environment management with value stream metrics will find this offering very beneficial.

Strong Performers

› **Targetprocess links AD&D with business but needs stronger platform capabilities.** Targetprocess delivers strong and integrated capabilities to connect development with business through its support for goal management (objectives and key results [OKRs]), finance controls, and an integrated analytical engine. Targetprocess was one of the few vendors to demonstrate support for human resource entities in its common data model, enabling planners to factor in resource

costs, schedules, and allocations. The UI and dashboard are clean and functional with numerous OOTB metrics. End users can easily extend and customize those metrics, which can incorporate custom data feeds.

Customer references explained that "it's been a bit of a revelation" since moving to Targetprocess and implementing its integrated support for OKRs, allowing them to discover disconnects between business goals and development effort. Targetprocess leverages third-party products Miro and Tasktop Hub to create a complete package; bundling these without additional costs would improve its overall offering. In addition, the dashboard, though nice, received critical customer feedback, requesting improved navigation, because the current menu system was "too deep." Customers looking to strongly connect business functions with development will see Targetprocess as a great solution.

› **IBM delivers a developer-focused solution; better UX will broaden its audience.** IBM's VSM solution (UrbanCode Velocity) is new and focuses on the AD&D team in several ways: first by delivering strong tool integration capabilities featuring an innovative "update-all" button that automatically checks and updates all tool connections. Its common data model is based on the MongoDB database engine and will be familiar to developers, and IBM's differentiating DevOps query language provides a query-based system for data exploration and discovery that works well for developer-minded users. On top of that, IBM provides useful OOTB metrics and KPIs such as lead time, cycle time, and build counts that many development teams are often looking for.

Reference customers noted the convenience of having this solution as their "single source of truth." However, others noted struggles related to reaching enterprise scale. Customization often requires directly editing Json files, which suits developers just fine, but layering a more friendly user experience (UX) is needed to enable less-technical roles to use this system. The dashboard, though good, lagged others' with a rough-around-the-edges feel. Despite these growing pains, there's still a lot to like about this product and its direction. Customers that are in the VSM learning and adoption phase can use this opportunity to further influence IBM's development of Velocity.

› **ConnectALL delivers strong tool integration but needs stronger analytics.** ConnectALL comes to the VSM market with a strong tool integration heritage, and customers appreciate those capabilities. To augment its numerous OOTB connectors, the vendor also has a patent-pending universal adapter to simplify creating integrations to any software development tool. ConnectALL's common data model optimizes its integration capabilities, allowing customers to easily integrate data from their entire toolchain. ConnectALL comes OOTB with support for popular development metrics such as cycle time and MTTR.

One customer reference explained how it connected its requirements tool with its planning and test management tool to create completed and connected lines of communication, saying, "It was very easy to set up." To improve this product, ConnectALL needs to hone its metric customization

capabilities as well as OOTB KPIs that can help companies go beyond output metrics and measure value delivered. Customers that are struggling with too many disconnected tools will benefit from using ConnectALL.

› **CloudBees has a strong product vision but lacks key capabilities.** CloudBees has a vision to enable a complete and connected toolchain to support VSM — whether through its tools or a third party; the vendor wraps this capability into its software delivery management offering. Its execution strategy included the acquisitions of continuous delivery and release automation vendor Electric Cloud and feature management vendor Rollout in 2019. The current offering is still a work in progress. Despite that, it offers the ability to completely map a value stream from idea to production and provides excellent support for third-party tools.

CloudBees still has work to do to create a compelling set of analytics and KPIs, and its solution lacks support for financials and compliance, which are two elements that value stream customers tell Forrester they find very valuable. To its credit, CloudBees recognizes these shortcomings, which are prominent in its product roadmap. Customers coming from a DevOps orientation that are familiar with CloudBees and its dev-driven culture will see a lot to like about this offering and its plans for future enhancements.

Contenders

› **Atlassian's product strategy is strong but needs to follow through to compete.** Atlassian's VSM vision jump-started with its 2019 acquisition of AgileCraft (rebranded as Jira Align), which infused portfolio capabilities into the Atlassian product line. Atlassian was already strong in product planning but was seen as more of a team-level product. With Jira Align, it now has the ability to do enterprise-scale planning. A strong and loyal customer base supports Atlassian, and we see this ecosystem and its legion of contributors further shaping this offering.

While Atlassian seems to have all the pieces and intentions to create a VSM solution, the vendor's current focus appears to be on Jira cloud. To compete with others, Atlassian needs the ability to govern third-party tools; a more comprehensive data model; mapping that goes beyond planning and into development, release, and operations; and improved metrics and analytics. Customers that are already using Atlassian's products will get the most value from this solution and its growing automation capabilities. As Atlassian expands this VSM offering to better integrate and govern third-party DevOps tools, it will become a more formidable competitor. Atlassian declined to participate in the full Forrester Wave evaluation process.

› **GitLab brings a minimum viable product (MVP) to the table.** No one should be surprised that GitLab's offering falls short on a few key criteria, as it follows the vendor's playbook to enter every market by first creating an MVP to test the waters and use direct customer feedback to guide its product plans. GitLab's developer-first culture comes through with OOTB metrics such as lead time, cycle time, deployment rate, and defect counts to help customers measure value delivered. And its Value Stream Analytics feature collects cycle-time metrics on each stage of the software

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development lifecycle by default and allows users to model their own process by defining custom stages and events. GitLab's complete DevOps toolchain enables this VSM solution to govern the flow of work, allowing teams to create automated rules to govern deployments.

Despite GitLab's MVP approach, its recent hiring of a new product leader to head its VSM direction is evidence of GitLab's commitment to creating a complete VSM solution. In addition to creating a more feature-rich solution, GitLab should alter its commercial model to better accommodate part-time users; the current per-user pricing is relatively expensive, especially at enterprise levels. Customers that are using GitLab or have a strong dev-culture and are looking for a modern DevOps toolchain will well suit GitLab's complete platform and the growing capabilities of its current VSM offering, which should only improve with its ambitious plans.

› **Blueprint excels on regulatory compliance but falls short on platform capabilities.** Blueprint focuses on its support for regulatory processes with its ability to map requirements and constraints throughout the software lifecycle, providing traceability and impact analysis to help manage changing regulations and requirements. Blueprint supports SAFe and maps both operational and business value streams to connect outcomes with planning efforts. Blueprint also incorporates integrations with robotic process automation platforms to provide further process automation capabilities.

Blueprint does not provide the breadth of features that others offered. Its common data model has fewer OOTB entities, integration and analytic capabilities require third-party tools, and customizations require expert help versus providing capable customization UIs. Blueprint best suits clients that are in highly regulated industries, such as government entities or suppliers; its ability to manage regulations is top-notch.

Evaluation Overview

We evaluated vendors against 30 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include KPI data capture and measurement, governance and compliance, data analytics and analysis, and VSM dashboards.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated their product vision, performance, planned enhancements, and commercial models.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's VSM revenue, number of enterprise customers, and number of live installations.

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Vendor Inclusion Criteria

Forrester included 11 vendors in the assessment: Atlassian, Blueprint, CloudBees, ConnectALL, Digital.ai, GitLab, IBM, Plutora, ServiceNow, Targetprocess, and Tasktop. Each of these vendors meet certain criteria:

› **The offering is marketed as a VSM solution.** The vendor identifies its generally available product as a VSM offering.

› **The product includes threshold VSM capabilities.** The vendor offering includes value stream mapping, a visualization dashboard, and a common data model that extends across an end-to-end value stream from ideation to delivery.

› **The offering is a distinct product from the vendor.** The vendor offering is either a standalone VSM product or a distinct part of a product suite.

› **The product has enterprise-class customers.** The vendor provided at least one enterprise customer reference to be interviewed or surveyed during our evaluation process.

› **Market presence and client interest are strong.** A vendor may, in Forrester's judgment, warrant inclusion or exclusion in this evaluation because of its market presence and interest from Forrester clients.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by May 14, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] In our first evaluation of VSM, basic capabilities like mapping and tool connection were differentiating factors. Those are now table stakes; vendors need to do more to stay ahead. For more information, see the Forrester report "The Forrester New Wave™: Value Stream Management Tools, Q3 2018."

[2] We surveyed 1,025 global developers who are manager level or higher. Source: Forrester Analytics Business Technographics® Developer Survey, 2020.

[3] CI/CD: continuous integration/continuous delivery. For more information on cloud-native CI/CD tools, see the Forrester report "Cloud CI Tools Mature To Meet Enterprise Challenges."

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