

# The Wave: Value Stream Management Solutions, Q4 2022

## WAVE REPORT

December 6, 2022

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## The 14 Providers That Matter Most And How They Stack Up

### Summary

In our 25-criterion evaluation of value stream management (VSM) providers, we identified the 14 most significant ones — Atlassian, Broadcom, CloudBees, ConnectALL, Digital.ai, GitLab, Harness, HCL Software/IBM, Jellyfish, Micro Focus, Planview, Plutora, ServiceNow, and Zenhub — and researched, analyzed, and scored them. This report shows how each provider measures up and helps CIOs, CTOs, and modern application development and delivery professionals select the right one for their needs.

## Value Stream Management Drives Modern Application Delivery Transformation

Until recently, shortening time to market, tracking value delivered, or simply finding software delivery bottlenecks was a game of guesswork and hopeful iteration. VSM changes that. By applying VSM across planning, development, and release, execs tell us that they can finally get the data they need to calculate time to market, find bottlenecks, and begin their journey toward determining value delivered. In 2022, vendors ranging from venture-backed startups to industry stalwarts are answering the call with VSM offerings that serve professionals from business to IT. VSM creates the common platform to enable tracking software creation, maintenance, governance, and value delivery from budgeting to operation. While some vendors have crafted VSM offerings from existing portfolio, planning, and operations tools, others have started from scratch with AI/ML engines that ingest data from git, Jira, and Jenkins to predict completion dates and perform software cost allocation. These newer vendors join a cadre of veteran VSM vendors with offerings that are no less innovative as they recognize that the market is just getting going.

As a result of these trends, VSM customers should look for providers that:

- **Invest in stronger predictive capabilities using AI/ML.** Reference customers using AI/ML-infused VSM solutions appreciated the ability to augment human- with machine-calculated delivery estimates — not to prove a person wrong, but to use the added data to ask deeper questions about dependencies and complexity and collectively create a more accurate estimate. This approach improves estimates and provides the kind of data that managers need to make informed trade-offs.
- **Use analytics to discover bottlenecks, visualize flow, and create more impact.** VSM was instrumental in helping one team perform root-cause analysis on their sluggish time to market. Instead of adding more developers to shrink time to market, they unblocked developers with better tools and tool adoption to double throughput.

- **Provide metrics and KPIs to create software delivery performance baselines.** Many enterprise software teams are still on a modern application development (MAD) journey and, as such, need baselines and benchmarks to find the best path forward. Teams that are still maturing their DevOps adoption will find metrics such as cycle time, mean time to recover, and release velocity critically important to taking the next steps to MAD.

## Evaluation Summary

The Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape.

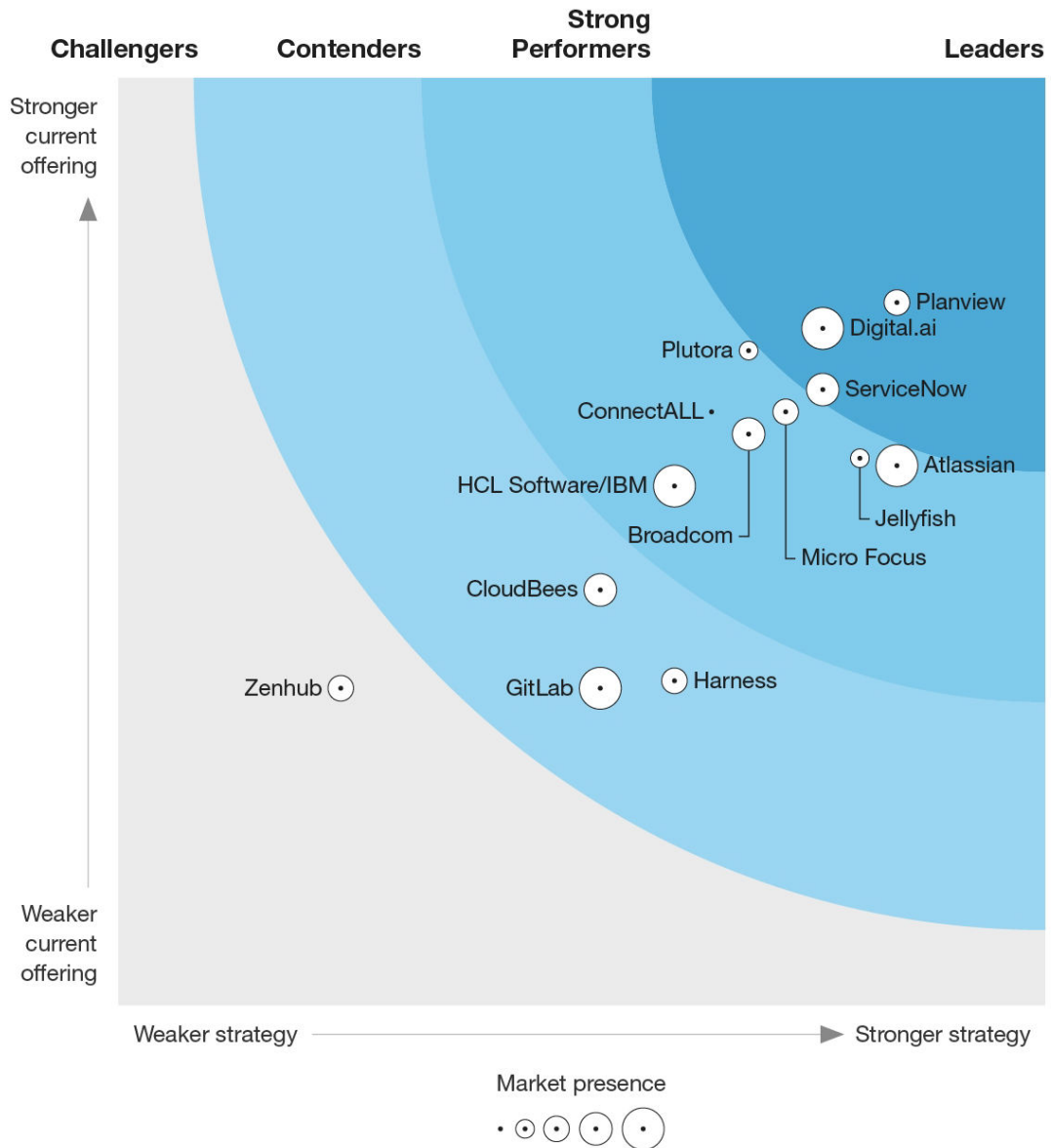
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the vendor comparison tool (see Figures 1 and 2).

**Figure 1**

**Value Stream Management, Q4 2022**

Value Stream Management

Q4 2022



**Figure 2**

**Value Stream Management Scorecard, Q4 2022**

	weighting	Atlassian	Broadcom	CloudBees	ConnectALL	Digital.ai	GitLab	Harness
<b>Current offering</b>	50%	2.91	3.08	2.24	3.20	3.65	1.71	1.75
Tool integration capabilities	10%	3.00	3.00	3.00	5.00	3.00	3.00	1.00
Common data model	15%	2.40	3.00	2.40	3.00	3.00	1.00	1.60
Mapping people, process, and data	15%	3.00	3.00	3.00	3.00	4.00	2.00	1.00
Capturing data, metrics, and KPIs	20%	2.40	2.80	1.90	3.60	3.50	2.00	2.40
Governance and compliance	10%	3.00	4.20	3.00	1.80	3.00	1.80	3.00
Data analytics and analysis	20%	3.00	3.00	0.75	3.00	4.00	1.00	1.50
End-user experience	10%	4.20	3.00	3.00	3.00	5.00	1.80	1.80
<b>Strategy</b>	50%	4.20	3.40	2.60	3.20	3.80	2.60	3.00
Product vision	20%	5.00	5.00	3.00	3.00	5.00	1.00	3.00
Market approach	20%	5.00	3.00	3.00	5.00	3.00	3.00	3.00
Supporting products and services	10%	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Planned enhancements	20%	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Innovation roadmap	20%	3.00	3.00	1.00	3.00	5.00	3.00	3.00
Partner ecosystem	10%	5.00	3.00	3.00	1.00	3.00	3.00	3.00
<b>Market presence</b>	0%	5.00	4.00	3.50	1.00	4.50	4.50	2.50
Revenue	50%	5.00	4.00	2.00	1.00	4.00	4.00	3.00
Number of customers	50%	5.00	4.00	5.00	1.00	5.00	5.00	2.00

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

	weighting	HCL Software/IBM	Jellyfish	Micro Focus	Planview	Plutora	ServiceNow	Zenhub
<b>Current offering</b>	50%	2.80	2.95	3.20	3.79	3.53	3.32	1.71
Tool integration capabilities	10%	3.00	1.00	3.00	4.00	4.00	4.00	1.00
Common data model	15%	3.00	3.00	3.00	4.40	3.60	3.00	0.70
Mapping people, process, and data	15%	3.00	2.00	3.00	3.00	3.00	3.00	2.00
Capturing data, metrics, and KPIs	20%	2.50	3.40	3.50	3.40	4.10	3.00	1.90
Governance and compliance	10%	3.00	0.40	3.00	3.00	4.20	4.20	1.00
Data analytics and analysis	20%	2.50	5.00	3.50	4.00	3.00	3.50	2.50
End-user experience	10%	3.00	3.80	3.00	5.00	3.00	3.00	2.20
<b>Strategy</b>	50%	3.00	4.00	3.60	4.20	3.40	3.80	1.20
Product vision	20%	1.00	5.00	3.00	5.00	3.00	3.00	1.00
Market approach	20%	3.00	5.00	3.00	5.00	3.00	3.00	1.00
Supporting products and services	10%	5.00	3.00	3.00	3.00	3.00	5.00	3.00
Planned enhancements	20%	3.00	3.00	5.00	3.00	5.00	5.00	1.00
Innovation roadmap	20%	3.00	5.00	3.00	5.00	3.00	3.00	1.00
Partner ecosystem	10%	5.00	1.00	5.00	3.00	3.00	5.00	1.00
<b>Market presence</b>	0%	5.00	2.00	2.50	2.50	1.50	4.00	2.50
Revenue	50%	5.00	2.00	4.00	3.00	2.00	5.00	1.00
Number of customers	50%	5.00	2.00	1.00	2.00	1.00	3.00	4.00

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

## Vendor Offerings

14 vendors were included in this assessment: Atlassian, Broadcom, CloudBees, ConnectALL, Digital.ai, GitLab, Harness, HCL Software/IBM, Jellyfish, Micro Focus, Planview, Plutora, ServiceNow, and Zenhub (see Figure 3).

## Figure 3

### Evaluated Vendors And Product Information

Vendor	Product evaluated
Atlassian	Jira Align, Jira Software Enterprise
Broadcom	ValueOps VSM
CloudBees	CloudBees
ConnectALL	ConnectALL 2.11, ConnectALL Insights, ConnectALL Automations Hub
Digital.ai	Digital.ai
GitLab	GitLab
Harness	Harness Modern Software Delivery
HCL Software/IBM	HCL Accelerate/IBM UrbanCode Velocity
Jellyfish	Jellyfish
Micro Focus	ValueEdge
Planview	Planview Tasktop Viz, Planview Tasktop Hub
Plutora	Plutora
ServiceNow	ServiceNow (IT Service Management, Strategic Portfolio Management)
Zenhub	Zenhub



## Vendor Profiles

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

### Leaders

- **Planview shines with impactful analytics and data modeling.** Planview’s Tasktop was an early entrant to the VSM market. It pioneered the Flow Framework, and its flow metrics are now part of nearly all vendor VSM offerings. Reference customers report high degrees of success in using Tasktop to analyze and uncover wasteful practices, resulting in higher throughput and value delivered. It received top scores for its broad vision and market approach, which aim to incorporate VSM at the highest level of enterprise leadership. And its innovation roadmap that includes a systemic approach to infusing data science into every aspect of its product also earns a top score. The remaining portions of its roadmap are on par, reflecting the competitive nature of the growing VSM market.

Planview’s Tasktop Hub provides excellent third-party integration capabilities. The common data model can capture and model data from all phases of software development, earning it high scores. Process optimization metrics include flow but do not include DevOps research and assessment (DORA), earning an on-par rating. Its analytics earned top scores with capabilities such as what-if work-in-progress (WIP) analysis, helping leaders find and remove bottlenecks. Rounding out this offering was a top-scoring dashboard that was well-organized and provided intuitive drill-downs to get deeper analysis. Enterprises with complex value streams will see lots of benefit from using Planview.

- **Digital.ai’s dashboard gives a comprehensive view of the value stream.** Digital.ai has been on a multiyear, multiacquisition journey that includes Arxan, CollabNet VersionOne, Experitest, Numerify, and XebiaLabs. Its plan to be a front-runner in AI-driven software delivery is taking shape and reflects the high score for its innovation roadmap, which aligns with needs in addressing the ever-growing complexity of enterprise software delivery. Its market approach — to help users regardless of their VSM maturity — was a common theme among vendors and

received an average score. Digital.ai is getting creative with pricing, using a token model, but end users and their procurement heads will be the final judges of that strategy.

Digital.ai's UI was excellent, providing a cohesive and informative experience that it tailors to each role. Mapping each phase of software delivery was straightforward, earning top scores. Process optimization metrics and key performance indicator (KPI) tracking offered a nifty at-a-glance capability to see multiple types of correlated data in one view. The common data model and data model extensibility are on par with other vendor offerings; good governance capabilities included a chain-of-custody feature to track artifact ownership. An area for improvement is metric extensibility, lacking some of the more helpful utilities that other vendors provided. Like other vendors, Digital.ai includes change risk prediction, earning on-par scores for predictive capabilities. Digital.ai is a good choice for large enterprise-scale software development teams that have complex and regulated software delivery value streams.

- **ServiceNow aligns its strategy to meet enterprise needs.** ServiceNow is well-known for its IT service management (ITSM) offering that powers many teams' change management processes and is one of the largest players in the VSM market. It combines ITSM with VSM to deliver a product strategy that aligns well with regulated enterprises. Top-scoring elements of its strategy included excellent product support, planned enhancements, and a vast partner ecosystem. Its vision and market approach rated average — a reflection of the competitive market that VSM has become. To remain competitive, ServiceNow presented a high-scoring set of planned enhancements that includes strategic investments in analytics and analysis capabilities.

Built on top of the ServiceNow platform, this VSM solution delivers top scores for third-party integration, which allowed reference customers to integrate their more "obscure tools." Also scoring high were capabilities for correlating business and performance, allowing enterprises to track costs versus performance across value streams. Compliance was also top scoring, while governance was average. It received on-par scores for data modeling, mapping, metrics, and KPIs. ServiceNow is a great choice for enterprises in regulated industries that prize speed, compliance, and value delivery at scale.

## Strong Performers

- Atlassian delivers solid VSM capabilities but needs to invest more in AI/ML.** Atlassian is one of the most recognized brands in the software development industry, with its agile planning tool, Jira, dominating the market. By leveraging Jira as the centerpiece of its VSM strategy, Atlassian delivers an above-average product vision that spans the entire software delivery org chart from business planner to operational engineer. As one reference customer noted, “By being able to integrate the functionality in one tool, we get more value as well as the analytics we require.” Also scoring high were Atlassian’s supporting products featuring a quick-call hotline and an ecosystem that includes one of the widest set of partners. Its innovation roadmap was rated average — to be a Leader, it needs to invest more in predictive and AI/ML analytics.

Atlassian’s dashboard was easy to navigate and serves each role well with familiar UI cues, earning it above-par scores. The data model is split between Jira Align and Jira, which is on par with other vendor offerings. Also, on par are out-of-the-box (OOTB) third-party connectors, mapping, and mapping extensibility as well as KPI tracking and value metrics. Governance and compliance rated average with the ability to help users enforce best practices. Data model extensibility relies on placeholder fields versus the ability to create completely new data fields, earning a below-par score. The VSM solution comprises several Atlassian products, earning average scores in that area. Atlassian’s strong strategy is best for new or existing Atlassian customers that prefer a unified view of their value streams without having to rip and replace each DevOps tool.

- Jellyfish has class-leading predictive scheduling capabilities but lacks compliance.** Former engineering heads looking for a better way to measure engineering progress, productivity, and cost allocations founded Jellyfish in 2018.

Whereas many VSM vendors look at VSM as a tool integration problem, Jellyfish looks at VSM as a data-science one. This approach is paying off, with reference customers praising its software completion-date estimation and cost capitalization tools that provide accurate cost breakdowns for each engineering initiative, saving them from monthly drudgery and guesswork that typically go into such reports.

Jellyfish is an AI-based product that ingests data on a scheduled basis (usually nightly); blends data from git, Jira, and Salesforce; and uses ML to find connections between effort and value delivered, enabling Jellyfish to earn top scores in analytics, analysis, KPI tracking, and value metrics. Jellyfish falls short with execution-related capabilities such as governance and compliance; users can inspect connected tools, but Jellyfish isn't able to direct workflows or enforce governance as well as others. It also has no compliance capability, a feature that enterprise leaders are looking for in VSM. Moving forward, the future looks bright for Jellyfish, with continued investment in innovative technologies that should help leadership find ways to help teams be more productive. Jellyfish is a good choice for developer organizations that want to improve their software estimation capabilities and have a better understanding of software development costs.

- **Plutora delivers leading compliance but needs a stronger strategy to get ahead.** Plutora is well-known for its release orchestration product, but its VSM product is a solid performer that has been part of all Wave evaluations on VSM, scoring well in each. Plutora gets a high score for planned enhancements, which users tell us completely align with their top needs. Its vision for a data-driven value cycle is good but not differentiating enough and thus earned an average rating. Like other vendors, the innovation roadmap includes shifting to a cloud-native architecture to improve scale and performance. Rounding out its strategy were average scores for its market approach, supporting products, and partner ecosystem.

Plutora's process optimization metrics earned high scores for a broad combination of charts and metrics that went beyond the typical DORA and flow metrics to get more data in the hands of executives. The third-party integration capability was excellent, with numerous connectors for nearly any DevOps tool. Data model extensibility got a top score for its ability to easily extend and incorporate custom data fields. As one customer noted in a vote of confidence, "We are extending to all epics, features, and

stories.” Metric extensibility got a top score for providing built-in utilities. Strong connections with IT systems of record and audit capabilities that include autoformatted change records earned top scores for compliance. The one area of weakness is correlating business and performance — better ties to objectives and key results (OKR) frameworks would help. Plutora is a good choice for engineering teams with complex release orchestrations and environment management challenges that need upstream visibility to maintain compliance and reduce risk.

- **Micro Focus delivers a strong offering, but its vision lacked depth.** Micro Focus is an enterprise player that is well-known for its COBOL, test automation, and ALM Octane product offerings. ValueEdge VSM is based on ALM Octane and as such has strong ties with portfolio management capabilities. Its vision of “VSM the easy way” is good but lacked depth in how that correlates with delivering value at scale. This offering has the support of a strong scoring partner ecosystem that featured numerous global systems integrators to help enterprises transition to VSM methodologies and got top scores for planned enhancements that include estimated completion dates (in beta) and end-to-end flow metrics. Rounding this out is an average innovation roadmap that includes further investments in AI/ML capabilities, which align with other vendor roadmaps.

Micro Focus earned high scores for correlating business, performance, and value metrics. As one customer noted, “ValueEdge is beginning to harness the value of what’s in there.” In nearly every other category, it earned on-par scores, which is commendable given that the product has only been on the market since early 2022. Third-party connectivity, data modeling, metrics, KPIs, governance, and compliance are all on par. Predictive AI/ML includes risk scoring to help managers understand the potential impact of issues within the code, earning an average score. All in all, this is a solid offering for enterprises with few weaknesses. Micro Focus is a good choice for enterprises software teams with complicated portfolios and diverse software delivery chains.

- **Broadcom ValueOps has strong portfolio capabilities but needs stronger analytics.** Broadcom has been an enterprise software player for many years. Its agile planning tool, Rally, was one of the first on the market as was its portfolio tool, Clarity. With ValueOps, Broadcom is building new software underpinnings to link several distinct tools together to create a more cohesive data sharing platform.

Customers are pleased, with one proclaiming that ValueOps “hits the nail on the head!” Its strategy to further enhance these joint capabilities received high scores and should enable Broadcom to provide more comprehensive metrics and analytical capabilities in the future. Broadcom’s market approach is a mix of strong outreach and opaque pricing, giving it an average score in that area.

Broadcom’s is one of the only offerings to be FedRAMP-compliant, which helped it receive high scores for compliance. Its KPI tracking features also scored high, with crisp graphics clearly showing trends. On-par features included its third-party tool integration, data modeling, and ability to map value streams. Broadcom’s predictive capabilities scored on par with its ability to show future trends. While the user experience was a bit disjointed, the OOTB back-end integration of its portfolio and planning tools earned it an average score for its solution model. The lack of DORA metrics resulted in a low score for optimization metrics. Broadcom is a good choice for enterprises that want to modernize and transform budgeting and portfolio management from funding tasks to funding value-based outcomes.

- **ConnectALL delivers a Swiss Army knife but needs a stronger strategy to keep pace.** ConnectALL delivers a solid VSM offering that customers appreciate. “It’s been eye-opening,” one customer noted. Its high-scoring market approach is winning new clients and includes free use of a value stream mapping tool. ConnectALL’s innovation roadmap includes more investment in AI, earning it an average score. To keep pace with bigger players, ConnectALL will need a broader enterprise vision, more aggressive roadmap, and larger ecosystem of partners and systems integrators.

ConnectALL features a top-scoring universal adapter that can integrate with nearly any third-party software tool or platform. Tool interaction was excellent, enabling ConnectALL to model and orchestrate the flow of software through the value stream. ConnectALL’s process optimization metrics were plentiful and received high scores for having DORA-4 and flow metrics. Average predictive capabilities were useful in detecting bottlenecks. It also had a decent capability to connect with value metrics, and KPI extensibility was on par. Compliance was below average because it did not demonstrate enough capability to warrant a higher score. ConnectALL is a good choice for enterprise engineering teams that can benefit from advanced metrics and a solid tool integration strategy.

- **HCL Software/IBM has innovative VSM visuals, but its strategy needs greater clarity.** IBM and HCL offer a single VSM solution. HCL does the development for IBM, and IBM shares the IP, which allows HCL to rebrand the solution for its customer base. IBM uses the “Velocity” product name, while HCL uses the name “Accelerate,” but these are the same product. Although there is a long-term multiyear partnership in place, several reference customers wondered who their vendor would be if the joint agreement were to end, warranting a need for greater clarity. HCL Software/IBM received on-par scores for planned enhancements that include linking to OKR frameworks to track business results. The market approach includes open source options, which spreads adoption. To become more competitive in this evolving market, a product vision with sharper focus on business outcomes is needed.

The HCL Software/IBM VSM dashboard was the most unique among vendors and provides an interesting at-a-glance view of all WIP. Third-party integration capabilities, tool interaction, data modeling, and model extensibility received average scores. Mapping capability was on par, as was mapping VSM elements, though that requires some coding skills. The ability to extend metrics with custom formulas was also good. Its value metrics and AI/predictive capabilities scored below par, two areas that have become table stakes for competing in this product category. HCL Software/IBM is a good choice for enterprise engineering teams focused on minimizing risk while modernizing legacy systems.

## Contenders

- **CloudBees delivers a dev-friendly solution but needs tighter ties with value delivery.** With more than 1 million open source Jenkins nodes running, CloudBees Jenkins is the most widely used continuous integration tool on the planet. Over the past half decade, CloudBees acquired CodeShip, Electric Cloud, and Rollout to create a complete, modern continuous integration/continuous delivery (CI/CD) toolchain, which CloudBees calls its “enterprise software delivery platform.”

Reference customers that are still in their evaluation periods found the value prop interesting. “We want to shrink release,” one noted. The CloudBees strategy is solid and scored on par in most strategic categories with a list of planned enhancements that includes opinionated dashboards and a stronger professional services team. One low score was for an innovation roadmap that is missing stronger predictive elements.

CloudBees offers a standalone VSM tool that works with a team’s existing CI/CD toolchain, providing an advantage over other brands that only work within their own toolchains. The CloudBees VSM dashboard and solution model are on par with other vendors, giving users a good OOTB experience and strong UI to navigate. CloudBees has an average number of OOTB integrations with third-party tools, including planning and security scanning tools to enable teams to connect the offering to their toolchains. Its ability to map and track work through stages of software delivery was on par with other vendor offerings but fell short on process and value metrics that have no AI/ML predictive capabilities. CloudBees is a good choice for development organizations that want to modernize software delivery capabilities while optimizing value delivery.

- **Harness’ completely SaaS-based offering is offset by weak analytical capabilities.** Harness, founded in 2018, offers a modern cloud-native CI/CD platform with integrated VSM. Harness received \$425 million in investment in 2022, which is helping it grow staff and capabilities and enabling its VSM product to take shape. Harness’ strategy mainly focuses on building out additional software delivery capabilities, but its VSM strategy still scored well, receiving on- par numbers for its vision, market approach, innovation roadmap, and partner ecosystem. While this strategy is good, it’s not good enough to help it become a VSM Leader; a more aggressive approach to adding leading VSM capabilities would help. Harness has an on-par list of planned enhancements including revamped screens for analytics.

Extensibility capabilities for metrics and the data model were good, allowing users to customize both. Its functionality for predicting costs got it an average score for predictive capabilities. Optimization metrics scored low due to the lack of flow metrics. Governance and compliance both scored average, offering policy as code and a unique ability to stop cloud services when they exceed certain cost thresholds. Reference customers focused on software delivery and remarked that Harness has



been a “good partner.” The Harness solution is best for developer- first organizations that want to integrate VSM with their DevOps toolchain to deliver a great developer experience.

- **GitLab has a dev-friendly VSM product but falls short in serving other roles.** GitLab VSM is an integrated feature of its GitLab product, a complete end-to-end integrated software delivery platform that includes all capabilities to plan, build, and deploy code in one product. By design, many features, such as VSM, are introduced to the toolchain and then incrementally improved, resulting in average scores for market approach, planned enhancements, and innovation roadmap. GitLab has a good number of partners to help customers get onto the GitLab platform. Its strategy to offer a single DevOps platform serves developers well but doesn’t embrace the growing need of VSM capabilities for product and portfolio execs, resulting in low scores for product vision.

GitLab’s capabilities include good third-party tool integration and interaction such as the ability to automate actions within the toolchain. GitLab governance was good, with policy as code capable of enforcing approvals on product releases and code deployments. Average process optimization metrics and KPI tracking show good improvement from previous Wave evaluations. The ability to track end-to-end value in its data model was not as strong as other vendors, earning it a below-average score. As one customer noted, “GitLab is still maturing in what they can provide.” Predictive capabilities have become differentiating but were nascent in GitLab’s product, earning a low score. To improve on VSM, GitLab must invest in greater analytics, analysis, and predictive capabilities that serve a growing number of roles within the enterprise. GitLab is a good choice for organizations that want to simplify their software delivery toolchain and improve their developer experience with a single approach to DevOps.

## Challengers

- **Zenhub’s dashboard is liked by engineers but lacks must-have VSM capabilities.** Zenhub is a self-funded startup, founded by software engineers wanting a better agile planning experience that catered to developers versus agile planning executives. To that end, Zenhub completely integrates into and depends on GitHub; users who have a GitHub account can easily install the Zenhub plug-in in their browser and be up and running in minutes. Zenhub’s vision is on par and includes creating a completely independent offering from GitHub. Supporting services also received on-par scores. Remaining portions of its strategy all scored below par. Zenhub needs to be more aggressive and have a stronger list of planned enhancements and innovation. The field of players is too strong to continue at its current pace.

Zenhub scored on par for its ability to map value stream resources, KPI tracking capabilities, and ability to capture value metrics. It also scored on par for its analytics and predictive capabilities. It falls short on more foundational VSM capabilities such as optimization metrics, the ability to map end-to-end value stream processes, and third-party tool integration. The data model scored below par and lacks the ability to add custom fields, a feature most enterprises need to incorporate custom processes and data. Zenhub is a good choice for autonomous software development teams that need tools that integrate with their dev environment.

## Evaluation Overview

We evaluated vendors against 25 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor’s position on the vertical axis of the Wave graphic indicates the strength of its current offering. Key criteria for these solutions include the tool integration capabilities, common data model, governance and compliance, data analytics and analysis, and end-user experience.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated the product vision, market approach, supporting products and services, planned enhancements, innovation roadmap, and partner ecosystem.
- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's VSM product revenue and number of customers using the primary solution.

## Vendor Inclusion Criteria

14 vendors were included in the assessment: Atlassian, Broadcom, CloudBees, ConnectALL, Digital.ai, GitLab, Harness, HCL Software/IBM, Jellyfish, Micro Focus, Planview, Plutora, ServiceNow, and Zenhub. Each of these vendors has an offering that:

- **Is marketed as a VSM solution.** The vendor identifies its generally available product as a VSM offering or an offering that includes VSM capabilities.
- **Includes threshold VSM capabilities.** The vendor offering incorporates greater than 50% of the core solution capabilities identified in The Value Stream Management Landscape, Q3 2022, such as (but not limited to) value stream data capture, data visualization, and a common data model that can normalize data across an end-to-end value stream from ideation to delivery.
- **Is a distinct product from the vendor.** The vendor offering is either a standalone VSM product or a distinct part of a product suite.
- **Has enterprise-class customers.** The vendor provided at least two enterprise customer references to be interviewed or surveyed during our evaluation process.

- **Has product revenue of at least \$5 million.** The vendor reported \$5 million in product revenue or more in The Value Stream Management Landscape, Q3 2022.
- **Maintains strong market presence and client interest.** A vendor may warrant inclusion or exclusion in this evaluation because of its market presence and interest from clients.