The Forrester New Wave™: Value Stream Management Tools, Q3 2018

The 13 Providers That Matter Most And How They Stack Up

by Christopher Condo and Bill Seguin
August 6, 2018

Why Read This Report

In Forrester's evaluation of the emerging market for value stream management (VSM) tools, we identified the 13 most significant providers in the category — Blueprint Software Systems, CA Technologies, CollabNet VersionOne, CloudBees, Electric Cloud, GitLab, Intland Software, Jama Software, Panaya, Plutora, Targetprocess, Tasktop, and XebiaLabs — and evaluated them. This report details how each vendor scored against 10 criteria and where they stand in relation to each other. Application development and delivery (AD&D) leaders should use it to select the right solution for improving software development.

Key Takeaways

No Vendor Leads The Pack
Forrester's research uncovered a market in which there are no Leaders; XebiaLabs, Plutora, CollabNet VersionOne, Tasktop, Targetprocess, and GitLab are Strong Performers; CloudBees, Intland Software, Jama Software, Blueprint Software Systems, and Panaya are Contenders; and Electric Cloud and CA Technologies are Challengers.

Mapping, Visualization, And Product Vision Are The Biggest Differentiators In The Market
VSM helps software development organizations visualize the development pipeline end to end. These tools capture, visualize, and analyze critical indicators of the speed and quality of software product creation. VSM is an emerging market: Vendors with a vision of empowering teams with analytics informed by real-world data and flexible planning schemes beat out those that focus on incremental enhancements within their traditional domains.

The Forrester New Wave™: Value Stream Management Tools, Q3 2018

The 13 Providers That Matter Most And How They Stack Up

by Christopher Condo and Bill Seguin
with Christopher Mines, Diego Lo Giudice, and Andrew Reese
August 6, 2018

Table Of Contents

Related Research Documents

Elevate Agile-Plus-DevOps With Value Stream Management

Now Tech: Value Stream Management Tools, Q3 2018

Use DevOps And Supply Chain Principles To Automate Application Delivery Governance

Share reports with colleagues.
Enhance your membership with Research Share.

FORRESTER®

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA
+1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up

August 6, 2018

Vendors Are Converging On The New VSM Market, But None Lead Yet

VSM is an emerging tool category that connects an organization's business to its software delivery capability. VSM tools provide multiple roles — product managers, developers, QA, and release managers — a view into planning, health indicators, and analytics, helping them collaborate more effectively to reduce waste and focus on work that delivers value to the customer and the business. Applying the concepts of value stream and lean to software development is not new, but having a single software tool that facilitates VSM is.[1] As C-suites increasingly focus on software as a primary means of customer engagement, AD&D pros are seeking tools to improve their quality and speed — and tool vendors are responding.

Software tool vendors from different niches of the dev pipeline are converging on the VSM space, each seeing their customer base craving greater transparency into their software product development processes. Because they're starting at different points, vendors have strengths and weaknesses as they stretch their capabilities to cover problem domains that don't reside in their core customer base. These vendors all have ambitious goals, but none of them have fully developed solutions, and thus none reached Leader status in our evaluation. Yet each shares some flavor of Forrester's vision for VSM: to unify end-to-end visibility of software development; unify the capture of data, events, and artifacts within the process; define and visualize key performance indicators (KPIs) that are meaningful to the business; govern the processes with reusable templates; and provide an inclusive customer experience (CX) that allows multiple roles to collaborate and deliver more value than they would working on siloed teams.

Value Stream Management Tools Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the Forrester New Wave evaluation, we evaluate only emerging technologies, and we base our analysis on a 10-criteria survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included 13 vendors in this assessment: Blueprint Software Systems, CA Technologies, CollabNet VersionOne, CloudBees, Electric Cloud, GitLab, Intland Software, Jama Software, Panaya, Plutora, Targetprocess, Tasktop, and XebiaLabs (see Figure 2 and see Figure 3). Each of these vendors has:

› **Annual VSM product revenue over $5 million.** Vendors in this report needed to show that their VSM solution had reached a critical mass for tool adoption and show over $5 million in annual revenue over the most recent period.

› **A cohesive VSM solution.** Some vendors have disparate tools that individually perform the functionalities of a value stream management tool. The sum of these tools' capabilities may resemble VSM tools, but they are not "smart" enough to coordinate. To be included in Forrester's evaluation, vendors must have demonstrated a level of cohesion between tools to show they can manage the value stream as a continuous process.

› **Forrester inquiry experience and what clients tell us about vendors.** We included vendors that called their VSM solutions to our attention via inquiries or vendors clients have told us about.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up

August 6, 2018

FIGURE 1 Assessment Criteria

Evaluation criteria	Criteria explanation
Analytics	Does the VSM solution provide analytics that can create what-if scenarios, such as predicting the impact of adding new steps to an existing value stream or adding an entirely new value stream to a portfolio? Does it use analytics to perform risk assessment or other decision support capability?
Common data model	Does the VSM solution have its own common data model to store data in a consistent, documented, easily accessible way? To what degree is this common data model extensible?
Governance	Does the VSM solution provide a framework to monitor compliance to organizational standards? Can it provide automated audit capabilities and traceability to help organizations maintain compliance?
Integration	Does the VSM solution provide integration with other tools? Can it enable data capture and tool chain visualization and act as the backbone of an integration framework? In addition, does the VSM solution allow the end user to double-click into each tool to directly observe status or take action within its UI?
Mapping	Does the VSM solution enable the mapping of business value, people, processes, data, and other artifacts across value streams so users can monitor how resources are being applied? Does this mapping capability overlay a flow of data and artifacts from idea to value delivered?
Value measurement	Does the VSM solution support business value definition? Can the tool calculate and track value it delivers to the business in terms of financials, time, effort, and other metrics? Can companies use custom metrics to define value?
Visualization	Does the VSM solution capture, measure, and provide end-to-end visualization of key performance indicators (KPIs) that measure efficiency and quality? Does it provide a visualization dashboard that users can customize to support different role-based views?
Vision	Does the three- to five-year vision support top-line (revenue- and growth-generating) business outcomes for clients? How well does the vision align with current customer trends and customers' future needs? Is the company identifying and addressing competitive threats?
Road map	How strong is the company's ability to define specific time frames, milestones, and benchmarks in its strategy? Does it have an approximately one year plan to execute on its vision in areas such as product enhancements, innovation strategy, commercial model enhancements, and partner ecosystem expansion?
Market approach	Can the company show tangible evidence of a successful approach to customers today, in terms of marketing messages, vertical market strategy, geographic strategy, account momentum and growth, and commercial model?

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up

August 6, 2018

FIGURE 2 Forrester New Wave™: Value Stream Management Tools, Q3 2018

THE FORRESTER NEW WAVE™
Value Stream Management Tools
Q3 2018

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS
August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up

FIGURE 3 Vendor QuickCard Overview

Company	Analytics	Common data model	Governance	Integration	Mapping	Value measurement	Visualization	Vision	Road map	Market approach
XebiaLabs	Differentiated	On par	On par	Differentiated	On par	On par	On par	Differentiated	On par	Differentiated
Plutora	Differentiated	Differentiated	Differentiated	On par	On par	On par	Differentiated	On par	On par	Differentiated
CollabNet VersionOne	Differentiated	Differentiated	On par	Differentiated	On par	Differentiated	Differentiated	On par	Differentiated	Needs improvement
Tasktop	Needs improvement	Differentiated	On par	Differentiated	Needs improvement	Needs improvement	Needs improvement	Differentiated	Differentiated	Differentiated
Targetprocess	On par	Differentiated	Needs improvement	On par	Differentiated	Differentiated	Differentiated	On par	On par	On par
GitLab	On par	Needs improvement	Needs improvement	Differentiated	Needs improvement	Differentiated	On par	On par	Differentiated	On par
CloudBees	Needs improvement	Needs improvement	Needs improvement	Needs improvement	On par	Needs improvement	Needs improvement	Differentiated	Differentiated	On par
Intland Software	Needs improvement	On par	Differentiated	On par	Differentiated	On par	On par	Needs improvement	On par	On par
Jama Software	Differentiated	On par	Differentiated	On par	Needs improvement	On par	Differentiated	On par	Needs improvement	Needs improvement
Blueprint Software Systems	On par	On par	On par	Needs improvement	Differentiated	On par	Needs improvement	Differentiated	Needs improvement	Needs improvement
Panaya	On par	On par	Differentiated	Needs improvement	Needs improvement	Needs improvement	On par	Needs improvement	On par	On par
Electric Cloud	Needs improvement	Needs improvement	On par	On par	On par	Needs improvement	On par	Needs improvement	Needs improvement	Differentiated
CA Technologies	On par	Needs improvement	Needs improvement	Needs improvement	Differentiated	Differentiated	Needs improvement	Needs improvement	Needs improvement	Needs improvement

⬆ Differentiated   ＝ On par   ⬇ Needs improvement

Vendor QuickCards

Forrester evaluated 13 vendors and ranked them against 10 criteria. Here's our take on each.

FORRESTER®

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
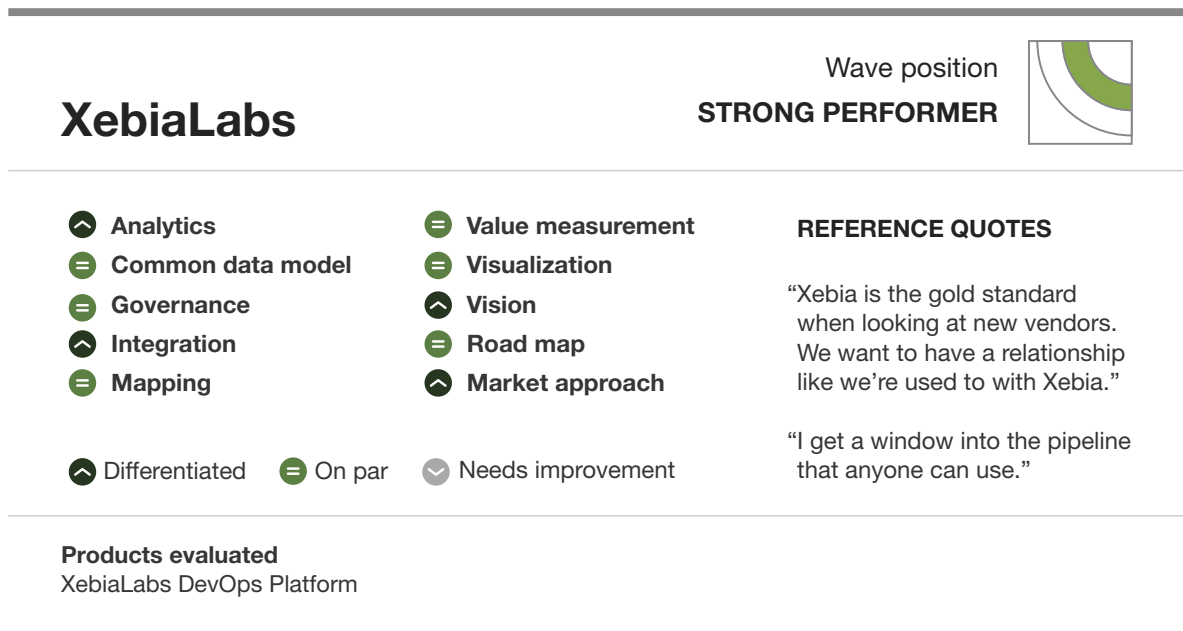
August 6, 2018

XebiaLabs: Forrester's Take

Our evaluation found that (see Figure 4):

› **XebiaLabs excels with robust complimentary capabilities.** Standout capabilities include analytics that take into account the impact of cost, duration, and risk. XebiaLabs also boasts an impressive list of out-of-the-box integrations. Its strong vision and road map embrace the spirit VSM and focus on removing constraints and reducing waste throughout the value stream.

› **XebiaLabs needs to strengthen mapping and value measurement capabilities.** Customers that want to bring this product into the business planning phase will need more comprehensive mapping capabilities and better tie in with value measurement.

› **XebiaLabs is the best for teams that favor Agile-plus-DevOps approach.** Organizations that see the developer as central to success and embrace development and operations (DevOps) will appreciate its dev-centric vision that focuses on automation and AI capabilities.

XebiaLabs Customer Reference Summary

Customers were more than happy to replace their spreadsheets with XebiaLabs DevOps Platform to orchestrate planning and gain insight into their software delivery process.

FIGURE 4 XebiaLabs QuickCard

XebiaLabs

Wave position
STRONG PERFORMER

⌃ Analytics	＝ Value measurement
＝ Common data model	＝ Visualization
＝ Governance	⌃ Vision
⌃ Integration	＝ Road map
＝ Mapping	⌃ Market approach

⌃ Differentiated ＝ On par ⌄ Needs improvement

REFERENCE QUOTES

"Xebia is the gold standard when looking at new vendors. We want to have a relationship like we're used to with Xebia."

"I get a window into the pipeline that anyone can use."

Products evaluated
XebiaLabs DevOps Platform

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
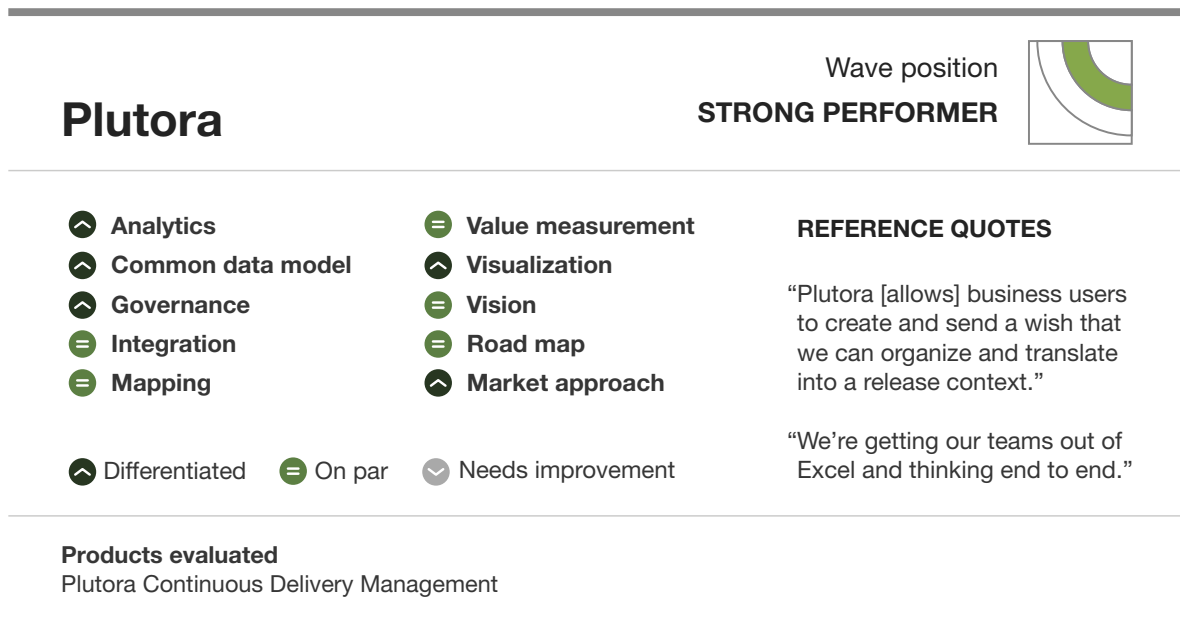
Plutora: Forrester's Take

Our evaluation found that (see Figure 5):

› **Plutora features robust visualizations and governance capabilities.** Plutora's out-of-the-box KPI visualizations give AD&D leaders the insights they need to make process improvements. Plutora also gives leaders controls with intuitive governance capabilities that are easy to reuse across different products and value streams.

› **Plutora still needs to improve value measurement.** The concepts of capturing value are there but need to be tied more firmly to tools that can measure business value.

› **Plutora is best for firms that want to connect and measure automated processes.** Plutora's ability to link, visualize, and orchestrate process will help organizations that seek greater transparency in their automated processes.

Plutora Customer Reference Summary

Customers saw improvement in their release process and their ability to track defects and outages in a more informative and data-driven manner. They'd like to see portfolio management capabilities improve.

FIGURE 5 Plutora QuickCard

Plutora

Wave position
STRONG PERFORMER

⌃ Analytics	⹀ Value measurement
⌃ Common data model	⌃ Visualization
⌃ Governance	⹀ Vision
⹀ Integration	⹀ Road map
⹀ Mapping	⌃ Market approach

⌃ Differentiated ⹀ On par ⌄ Needs improvement

REFERENCE QUOTES

"Plutora [allows] business users to create and send a wish that we can organize and translate into a release context."

"We're getting our teams out of Excel and thinking end to end."

Products evaluated
Plutora Continuous Delivery Management

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
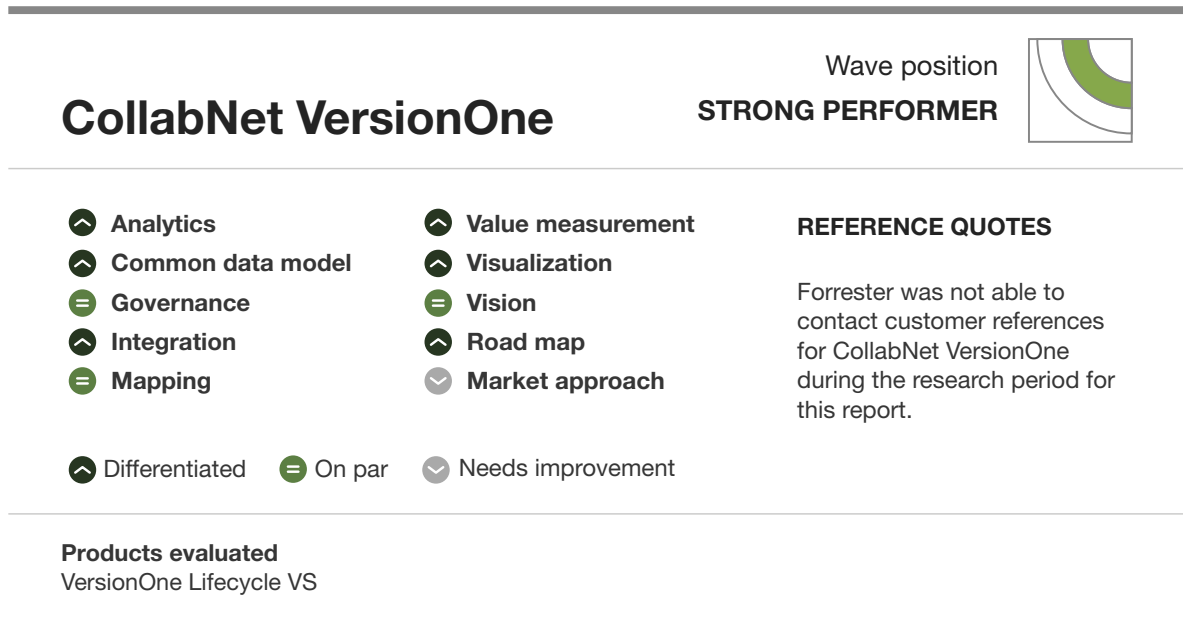
August 6, 2018

CollabNet VersionOne: Forrester's Take

Our evaluation found that (see Figure 6):

› **CollabNet provides a balance of top-scoring, integrated capabilities.** CollabNet's merger with VersionOne creates a nearly complete VSM solution from Agile planning to release, and it comes preintegrated.

› **CollabNet needs to align its vision and road map to provide a unified VSM experience.** CollabNet's vision and road map appeared too short-term; we'd like to see a stronger, VSM-centric vision, clearly supported by tactical initiatives and improvements.

› **CollabNet is the best fit for companies that want out of the box integration.** CollabNet's preintegrated pipeline with strong analytics, git-based source code management (SCM), and V1 planning tool can help software teams focus more on development and less on integration.

CollabNet VersionOne Customer Reference Summary

Forrester was unable to contact customer references for CollabNet VersionOne during the research period for this report.

FIGURE 6 CollabNet VersionOne QuickCard

CollabNet VersionOne

Wave position
STRONG PERFORMER

⌃ Analytics	⌃ Value measurement
⌃ Common data model	⌃ Visualization
= Governance	= Vision
⌃ Integration	⌃ Road map
= Mapping	⌄ Market approach

⌃ Differentiated   = On par   ⌄ Needs improvement

REFERENCE QUOTES

Forrester was not able to contact customer references for CollabNet VersionOne during the research period for this report.

Products evaluated
VersionOne Lifecycle VS

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
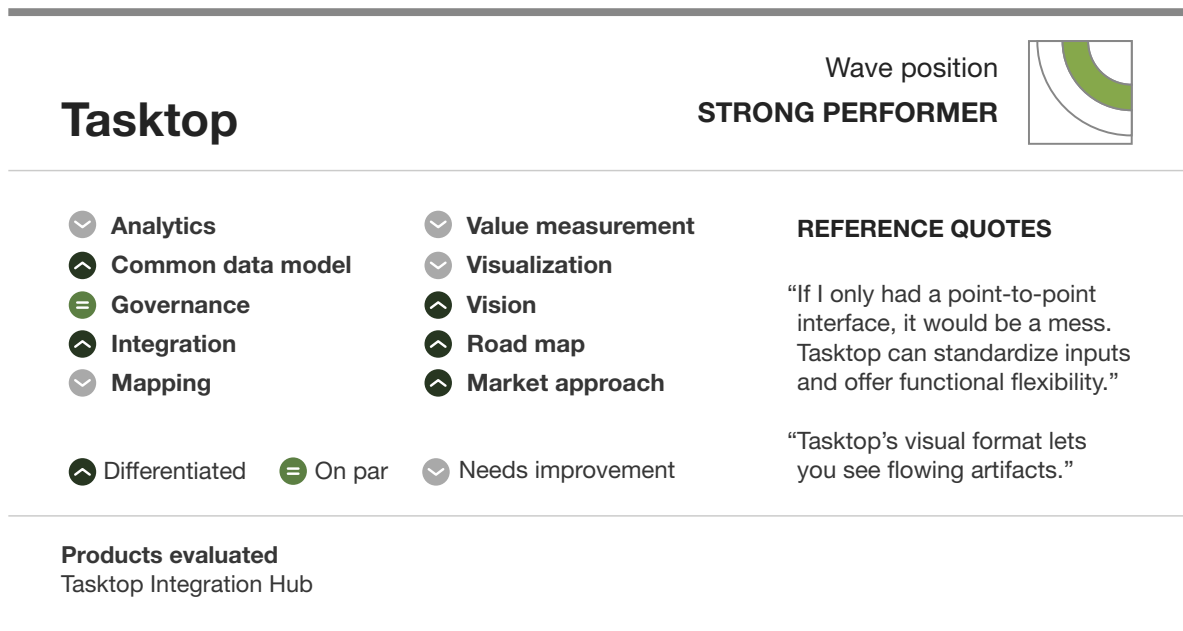The 13 Providers That Matter Most And How They Stack Up

Tasktop: Forrester's Take

Our evaluation found that (see Figure 7):

› **Tasktop envisions a new role: value stream architect.** Tasktop's laser focus on VSM is guided by its vision and prediction that the role of value stream architect will emerge to manage the complexities of delivering modern applications.

› **Tasktop needs to add a number of capabilities to be a complete VSM tool.** Tasktop has the foundation to build a comprehensive VSM tool. To get there, it needs to build on it with visualization, analytics, and governance capabilities.

› **Tasktop is a best fit for companies that want a best-of-breed DevOps stack.** Tasktop aims to integrate and coordinate value streams across your DevOps stack from ideation to production, but it will leave domain-specific work to other specialized tools.

Tasktop Customer Reference Summary

Tasktop's customers praised its ability to give them a lens into their software development processes and provide transparency into their process flow.

FIGURE 7 Tasktop QuickCard

Tasktop

Wave position
STRONG PERFORMER

⌄ Analytics	⌄ Value measurement
⌃ Common data model	⌄ Visualization
═ Governance	⌃ Vision
⌃ Integration	⌃ Road map
⌄ Mapping	⌃ Market approach

⌃ Differentiated ═ On par ⌄ Needs improvement

REFERENCE QUOTES

"If I only had a point-to-point interface, it would be a mess. Tasktop can standardize inputs and offer functional flexibility."

"Tasktop's visual format lets you see flowing artifacts."

Products evaluated
Tasktop Integration Hub

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
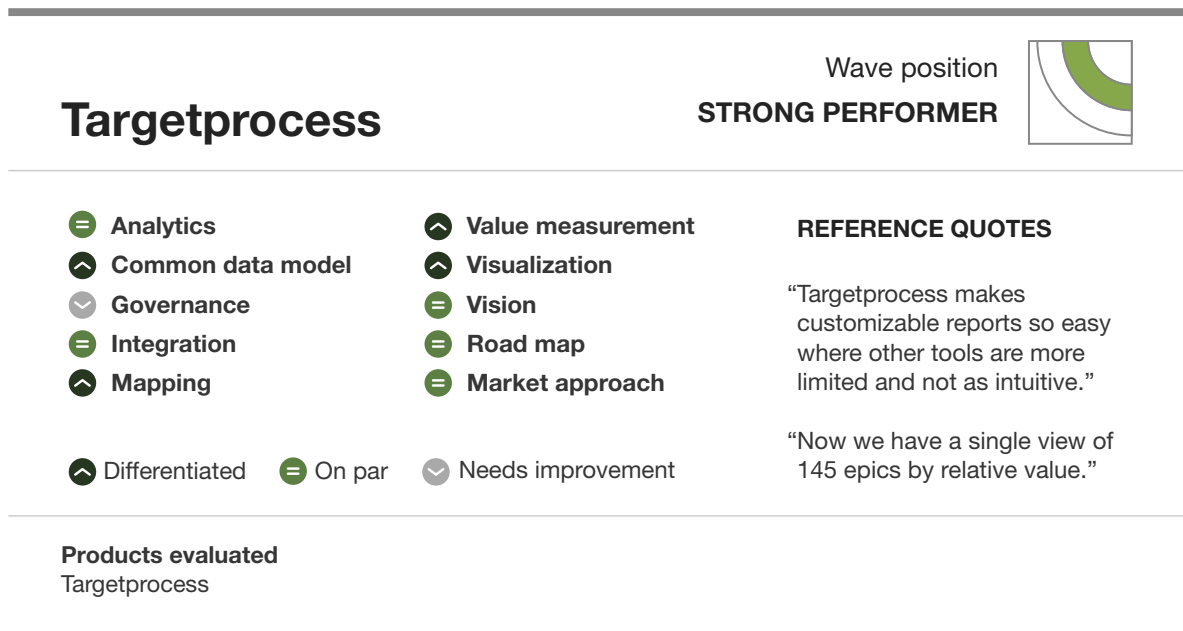
August 6, 2018

Targetprocess: Forrester's Take

Our evaluation found that (see Figure 8):

› **Targetprocess provides a powerful platform featuring robust visualization capabilities.** Targetprocess has taken a platform approach, providing highly flexible and configurable dashboards that allow users to create integrated experiences, as well as a very flexible process-mapping capability that is not overly prescriptive.

› **Targetprocess still needs to sharpen its vision toward VSM.** A platform can only take you so far; we'd like to see Targetprocess offer more guidance toward helping teams integrate governance into their value stream.

› **Targetprocess works well for organizations that want to customize their experience.** This solution's ability to create custom dashboards allows businesses to have one application that can serve every role in the value stream.

Targetprocess Customer Reference Summary

Targetprocess customers appreciated the flexibility of this solution's planning capability. Several mentioned migrating from more prescriptive Agile planning tools to Targetprocess to gain this flexibility.

FIGURE 8 Targetprocess QuickCard

Targetprocess

Wave position
STRONG PERFORMER

◒ Analytics	◒ Value measurement
⌃ Common data model	⌃ Visualization
⌄ Governance	◒ Vision
◒ Integration	◒ Road map
⌃ Mapping	◒ Market approach

⌃ Differentiated   ◒ On par   ⌄ Needs improvement

REFERENCE QUOTES

"Targetprocess makes customizable reports so easy where other tools are more limited and not as intuitive."

"Now we have a single view of 145 epics by relative value."

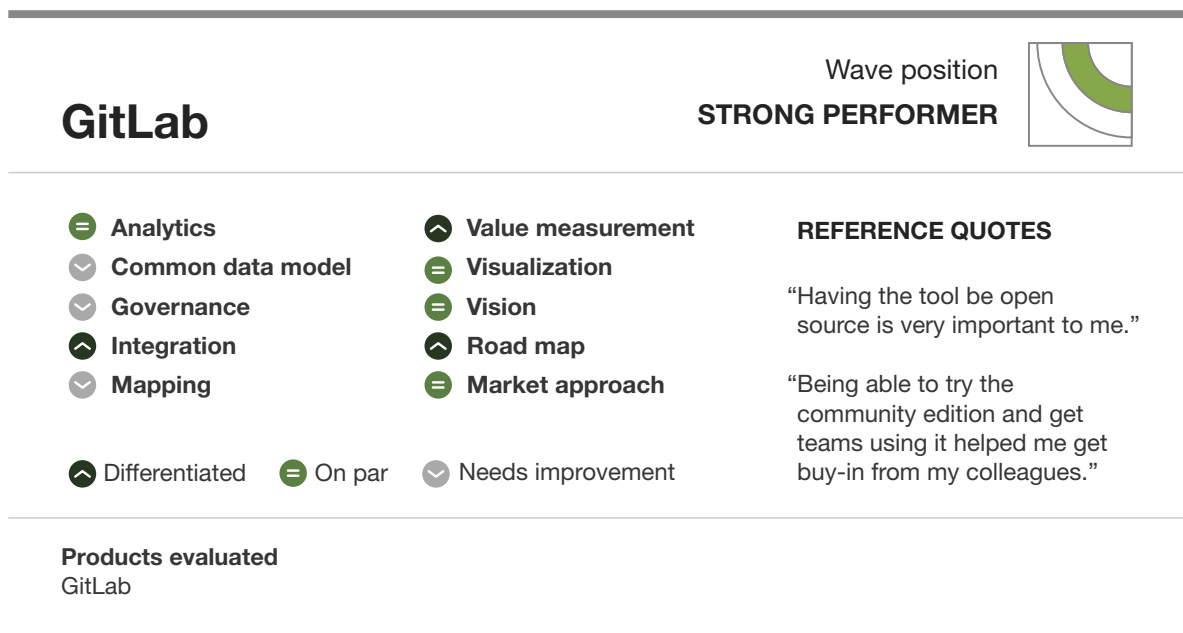**Products evaluated**
Targetprocess

GitLab: Forrester's Take

Our evaluation found that (see Figure 9):

› **GitLab combines end-to-end capability with the power of open source.** GitLab offers a DevOps tool for each step of the software development process. Top-level views sitting across these tools provide its VSM functionalities.

› **GitLab needs greater depth with mapping and governance.** GitLab's basic mapping and governance capabilities lag behind other VSM competitors'. With an end-to-end tool chain, GitLab should offer more comprehensive traceability and process governance.

› **GitLab is best for companies that are looking for a broad, integrated solution.** Organizations that want a comprehensive VSM solution that can also serve as their DevOps tool chain will really appreciate GitLab. GitLab's vision is firmly open source and dev-centric; companies that live and breathe dev-first will appreciate this approach.

GitLab Customer Reference Summary

GitLab's customers are OK with its basic VSM capabilities because they come combined with a complete DevOps stack and a policy to maintain all the integrations regularly, allowing developers more time to create new products with less time tending to the DevOps stack.

FIGURE 9 GitLab QuickCard

GitLab

Wave position
STRONG PERFORMER

⊖ **Analytics**
⊘ **Common data model**
⊘ **Governance**
⊚ **Integration**
⊘ **Mapping**

⊛ **Value measurement**
⊖ **Visualization**
⊖ **Vision**
⊚ **Road map**
⊖ **Market approach**

⊚ Differentiated   ⊖ On par   ⊘ Needs improvement

REFERENCE QUOTES

"Having the tool be open source is very important to me."

"Being able to try the community edition and get teams using it helped me get buy-in from my colleagues."

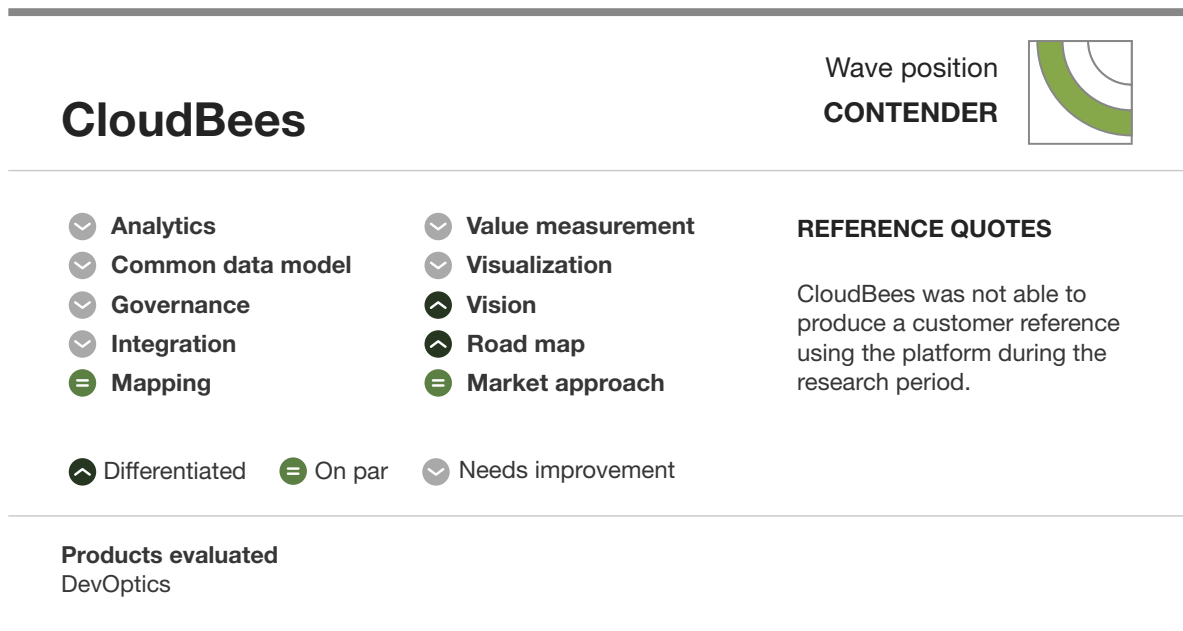**Products evaluated**
GitLab

CloudBees: Forrester's Take

Our evaluation found that (see Figure 10):

› **CloudBees has a strong vision for VSM.** CloudBees is working to expand upon its CI tools with a VSM vision that includes greater developer autonomy, end-to-end visibility from planning to release, and CloudBees apps to bolster continuous integration and continuous delivery (CI/CD) offerings.

› **CloudBees needs capabilities to match their vision.** CloudBees' current offering was weak when compared to the other vendors in this category. It has the kernel of a VSM product but needs to build out numerous capabilities to become a player in this market.

› **CloudBees is best for AD&D teams that see CI as the core of their DevOps tool chain.** Organizations that are dev-driven and see CloudBees Jenkins as a core component of their DevOps tool chain will see CloudBees' VSM vision as their next logical progression to a fully managed value stream.

CloudBees Customer Reference Summary

CloudBees was unable to provide customer references for this report. Past reports indicate that customers like that CloudBees is an open source company.

FIGURE 10 CloudBees QuickCard

CloudBees

Wave position
CONTENDER

⌄ **Analytics**	⌄ **Value measurement**
⌄ **Common data model**	⌄ **Visualization**
⌄ **Governance**	⌃ **Vision**
⌄ **Integration**	⌃ **Road map**
＝ **Mapping**	＝ **Market approach**

REFERENCE QUOTES

CloudBees was not able to produce a customer reference using the platform during the research period.

⌃ Differentiated   ＝ On par   ⌄ Needs improvement

Products evaluated
DevOptics

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
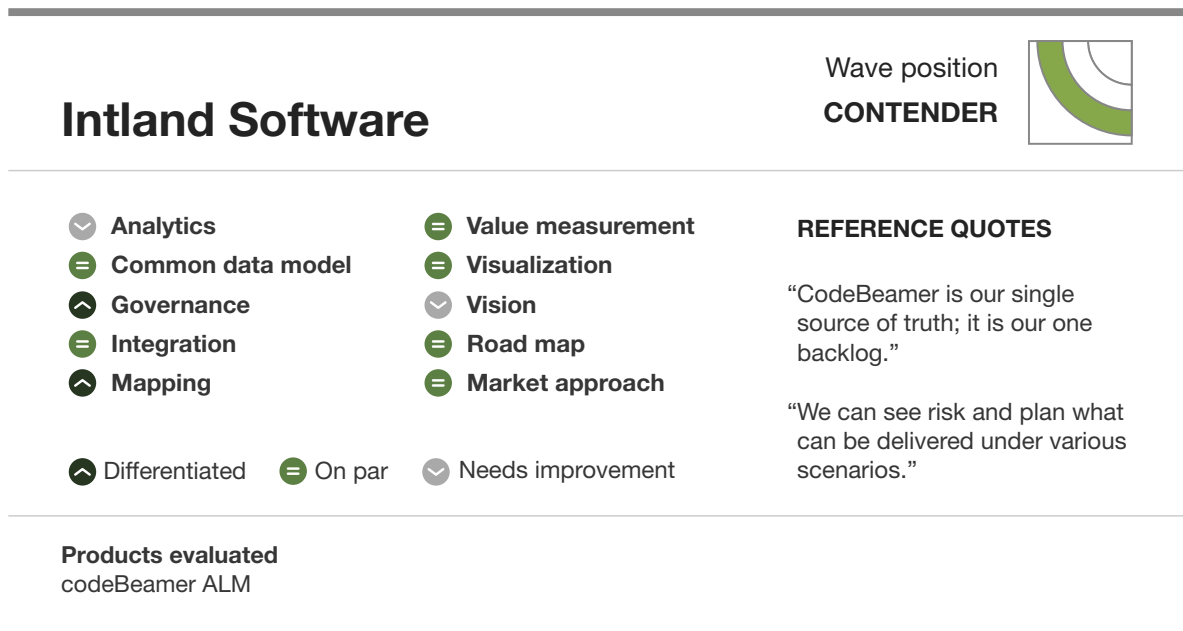
Intland Software: Forrester's Take

Our evaluation found that (see Figure 11):

› **Intland leads with robust governance and mapping capabilities.** Its strength in governance reflects its heritage in highly governed industries such as automotive and aerospace manufacturing. This is paired with top-notch mapping capabilities that allow customers to visualize complex product development value streams.

› **Intland's strategy is too focused on beating out legacy tools.** Intland isn't swinging for the fences in its strategy. Instead, its main goal is to win in its application life-cycle management (ALM) space. While that may be valuable, it does not harmonize with a next generation VSM vision.

› **Businesses working in complex, highly regulated environments should use Intland.** Intland provides modern approaches to VSM starting with requirements and governance; capabilities not available from legacy requirements tools.

Intland Software Customer Reference Summary

Customers praised Intland for enabling them to automate requirements management, map process flows, capture metrics, and, for the first time, apply VSM to their complex business processes.

FIGURE 11 Intland Software QuickCard

Intland Software

Wave position
CONTENDER

⌄ Analytics	⊜ Value measurement
⊜ Common data model	⊜ Visualization
⌃ Governance	⌄ Vision
⊜ Integration	⊜ Road map
⌃ Mapping	⊜ Market approach

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"CodeBeamer is our single source of truth; it is our one backlog."

"We can see risk and plan what can be delivered under various scenarios."

Products evaluated
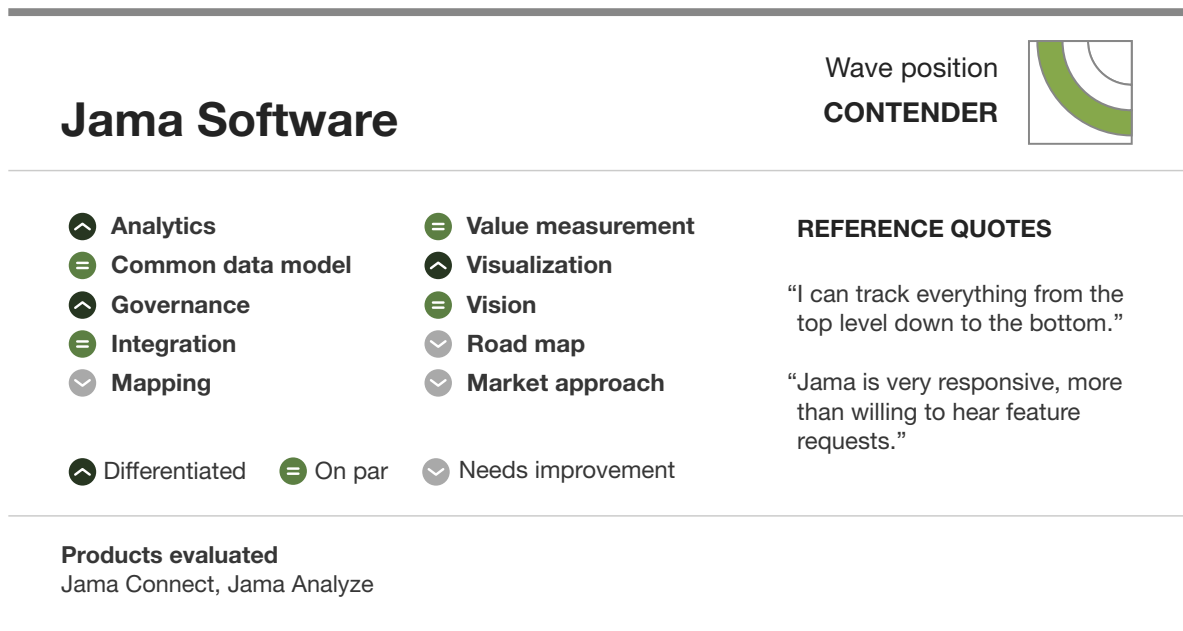codeBeamer ALM

Jama Software: Forrester's Take

Our evaluation found that (see Figure 12):

› **Jama features robust analytics and governance capabilities.** Jama's roots in requirements management shine through with its VSM solution that provide basic what-if analysis and a centralized review center to simplify compliance. Its acquisition of Notion has also added analytic capabilities that have the potential to be game-changing.

› **Jama's road map should include unifying Jama Connect with Jama Analyze.** Customers are looking for integrated solutions and don't want to negotiate piecemeal contracts to get the full VSM capability they need to be successful.

› **Jama is best for companies that need strong governance.** Jama helps teams maintain a connection between requirements and work being executed with integrated traceability.

Jama Software Customer Reference Summary

Jama customers praised its ability to capture nonfunctional requirements and allow them to be reused for other products, saving time and enabling a standardized approach to creating value streams.

FIGURE 12 Jama Software QuickCard

Jama Software

Wave position
CONTENDER

⌃ Analytics	＝ Value measurement
＝ Common data model	⌃ Visualization
⌃ Governance	＝ Vision
＝ Integration	⌄ Road map
⌄ Mapping	⌄ Market approach

⌃ Differentiated ＝ On par ⌄ Needs improvement

REFERENCE QUOTES

"I can track everything from the top level down to the bottom."

"Jama is very responsive, more than willing to hear feature requests."

Products evaluated
Jama Connect, Jama Analyze

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
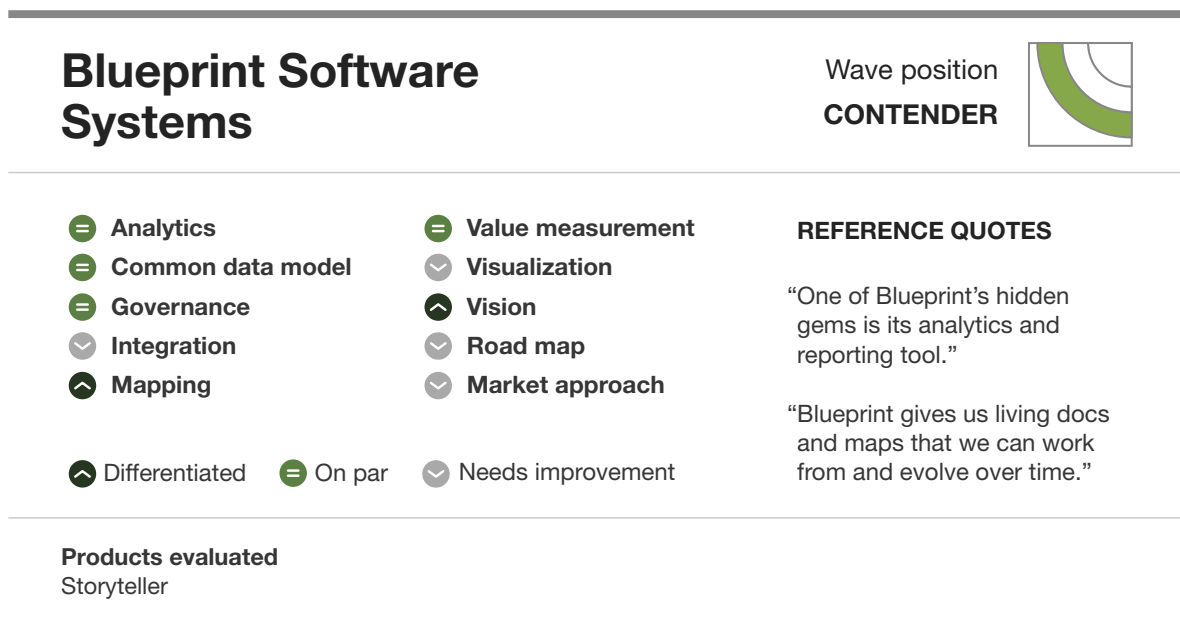
Blueprint Software Systems: Forrester's Take

Our evaluation found that (see Figure 13):

› **Blueprint has strong mapping with an AI-infused strategic vision.** An intuitive process to create complex value stream maps serves as the cornerstone of Blueprint's VSM offering. With a bold vision, Blueprint plans to artificial intelligence (AI) to improve requirements definition and bridge the gap between business experts and software developers.

› **Blueprint needs a road map that measures up to their vision.** Blueprint's road map should focus more on features that will enable its vision of collaborative planning and execution from business to IT.

› **Replace your manual spreadsheet with Blueprint.** Blueprint's modern approach to planning includes impact analysis and automatic KPI capture. Its star-schema database enables complex analytics when combined with a third-party tool such as Microsoft's Power BI.

Blueprint Software Systems Customer Reference Summary

Blueprint customers praised Blueprint's ability to measure the efficiency of its value streams with automatically generated KPIs for process times.

FIGURE 13 Blueprint Software Systems QuickCard

Blueprint Software Systems

Wave position
CONTENDER

⊜ Analytics	⊜ Value measurement
⊜ Common data model	⌄ Visualization
⊜ Governance	⌃ Vision
⌄ Integration	⌄ Road map
⌃ Mapping	⌄ Market approach

⌃ Differentiated ⊜ On par ⌄ Needs improvement

REFERENCE QUOTES

"One of Blueprint's hidden gems is its analytics and reporting tool."

"Blueprint gives us living docs and maps that we can work from and evolve over time."

Products evaluated
Storyteller

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
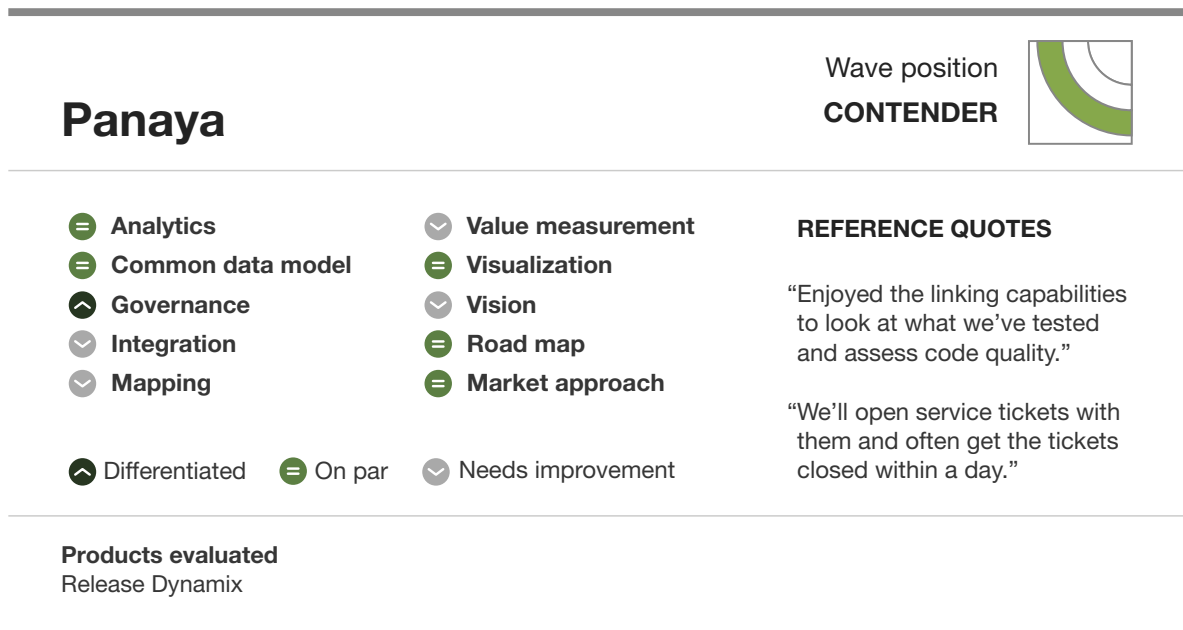
August 6, 2018

Panaya: Forrester's Take

Our evaluation found that (see Figure 14):

› **Panaya delivers actionable insights.** Panaya empowers SAP developers with code-quality analytics that measure impact and risk. Its VSM solution provides visualizations that are easy to understand and gives helpful guidance to AD&D leaders who need to assess risk and maintain compliance.

› **Panaya's strategy is limited to packaged apps.** Panaya's plan to expand from SAP to Salesforce will surely help it grow, but it is still limiting. It should consider moving beyond these platforms and into general areas of software development.

› **Modernize your SAP app-dev process with Panaya's VSM solution.** Panaya gives SAP AD&D leaders a modern tool to manage their development process, perform impact analysis, and reduce risk.

Panaya Customer Reference Summary

Panaya's customers praised its ability to link requirements to defects to gain better visibility into the overall value stream with charts and data visualizations that help them manage and reduce risk.

FIGURE 14 Panaya QuickCard

Panaya

Wave position
CONTENDER

⊜ Analytics	⌄ Value measurement	**REFERENCE QUOTES**
⊜ Common data model	⊜ Visualization	
⌃ Governance	⌄ Vision	"Enjoyed the linking capabilities to look at what we've tested and assess code quality."
⌄ Integration	⊜ Road map	
⌄ Mapping	⊜ Market approach	

⌃ Differentiated　　⊜ On par　　⌄ Needs improvement

"We'll open service tickets with them and often get the tickets closed within a day."

Products evaluated
Release Dynamix

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
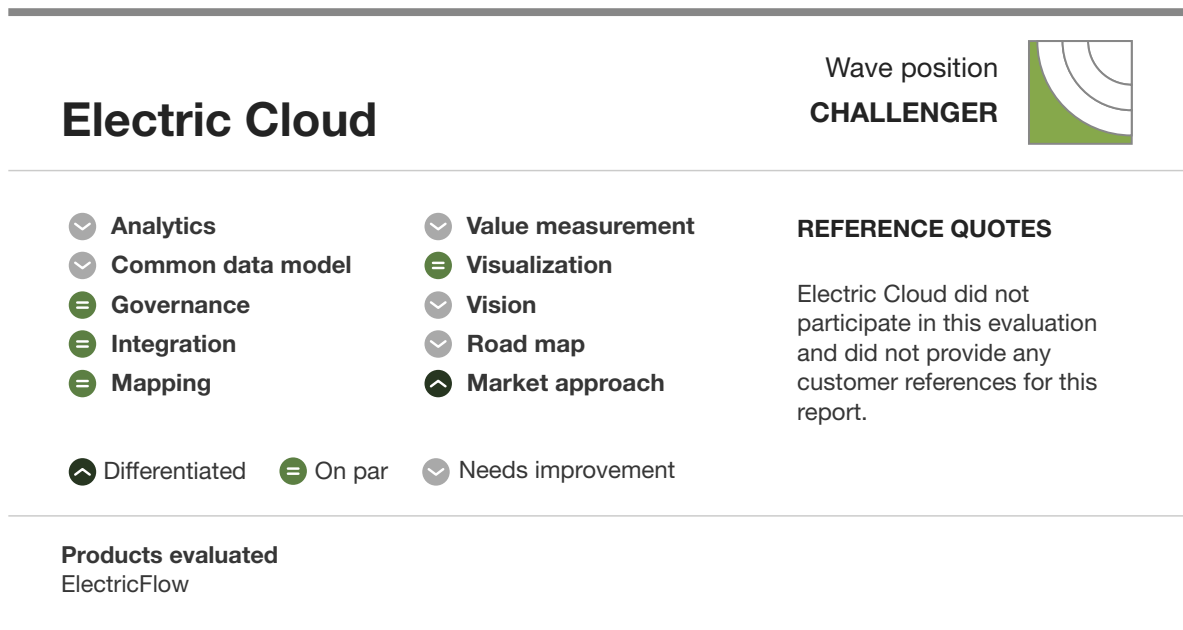
Electric Cloud: Forrester's Take

Our evaluation found that (see Figure 15):

› **Electric Cloud has strong visualization capabilities.** Electric Cloud's VSM offering has strong visualization capabilities, such as a comprehensive dashboard for managing microservices that includes deployment by time, success/failures, and cluster utilization.

› **Electric Cloud's VSM solution needs to enable greater business input.** Electric Cloud's visibility from CI to release needs stronger integration to business planning tools to capture flow metrics from end to end and provide more comprehensive VSM capabilities.

› **Electric Cloud can help AD&D teams working on diverse delivery platforms.** Electric Cloud's solutions span open systems, Windows, and mainframes, enabling VSM inclusiveness across diverse platforms which are typical of large enterprises.

Electric Cloud Customer Reference Summary

Electric Cloud did not participate in this evaluation and did not provide customer references.

FIGURE 15 Electric Cloud QuickCard

Electric Cloud

Wave position
CHALLENGER

- ⌄ **Analytics**
- ⌄ **Common data model**
- ⊜ **Governance**
- ⊜ **Integration**
- ⊜ **Mapping**

- ⌄ **Value measurement**
- ⊜ **Visualization**
- ⌄ **Vision**
- ⌄ **Road map**
- ⌃ **Market approach**

REFERENCE QUOTES

Electric Cloud did not participate in this evaluation and did not provide any customer references for this report.

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

Products evaluated
ElectricFlow

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up
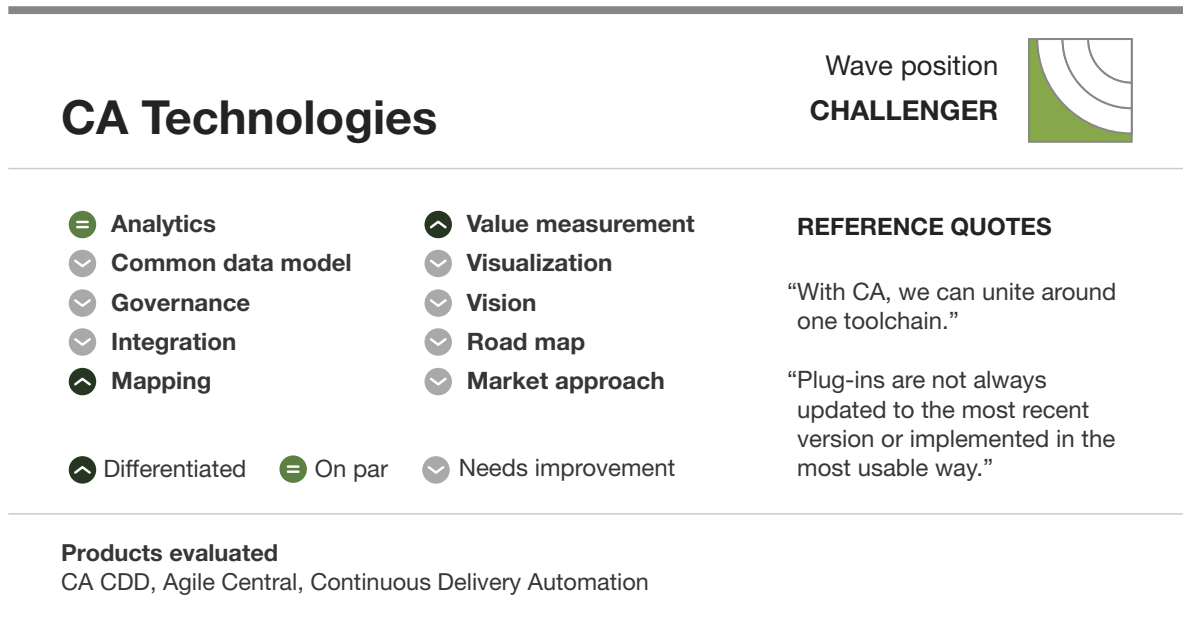
CA Technologies: Forrester's Take

Our evaluation found that (see Figure 16):

› **CA Technologies has a strong portfolio management and test tools.** CA excelled at portfolio management and testing tools. In fact, its main strength is the sheer number of tools it offers.

› **CA Technologies needs to create one VSM solution to simplify its market approach.** CA's VSM solution is federated; without buying all four components, a customer doesn't get an end-to-end picture, and each picture is different. Its enterprise pricing scheme is complicated and opaque, and it won't appeal to teams looking for a simple, single-priced solution.

› **CA Technologies is a good fit for enterprise companies that need to scale agile.** CA Technologies is designed for larger, more complex enterprises looking to scale up their Agile practices. They also offer a one-stop-shop for nearly every tool in an AD&D process.

CA Technologies Customer Reference Summary

Customers praised CA's support for scaled Agile frameworks for enterprise (SAFe), allowing them to scale their VSM solution across multiple business units.

FIGURE 16 CA Technologies QuickCard

CA Technologies

Wave position
CHALLENGER

- ⊜ Analytics
- ⌄ Common data model
- ⌄ Governance
- ⌄ Integration
- ⌃ Mapping

- ⌃ Value measurement
- ⌄ Visualization
- ⌄ Vision
- ⌄ Road map
- ⌄ Market approach

⌃ Differentiated ⊜ On par ⌄ Needs improvement

REFERENCE QUOTES

"With CA, we can unite around one toolchain."

"Plug-ins are not always updated to the most recent version or implemented in the most usable way."

Products evaluated
CA CDD, Agile Central, Continuous Delivery Automation

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 6, 2018

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

Learn more.

Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

Learn more.

Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

Learn more.

Forrester's research apps for iOS and Android.
Stay ahead of your competition no matter where you are.

Supplemental Material

The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester New Wave™: Value Stream Management Tools, Q3 2018
The 13 Providers That Matter Most And How They Stack Up

August 6, 2018

Integrity Policy

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

Endnotes

[1] See the Forrester report "Elevate Agile-Plus-DevOps With Value Stream Management."

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

› Core research and tools
› Data and analytics
› Peer collaboration
› Analyst engagement
› Consulting
› Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals	**Technology Management Professionals**	**Technology Industry Professionals**
CMO	CIO	Analyst Relations
B2B Marketing	› Application Development & Delivery	
B2C Marketing	Enterprise Architecture	
Customer Experience	Infrastructure & Operations	
Customer Insights	Security & Risk	
eBusiness & Channel Strategy	Sourcing & Vendor Management	

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.