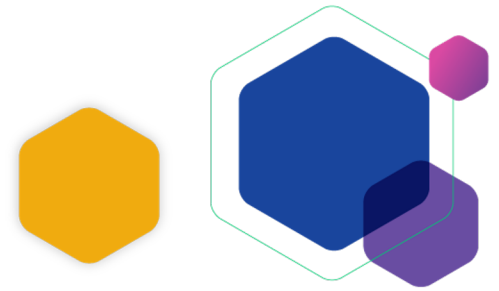




CloudBees® Global VSM Survey Report

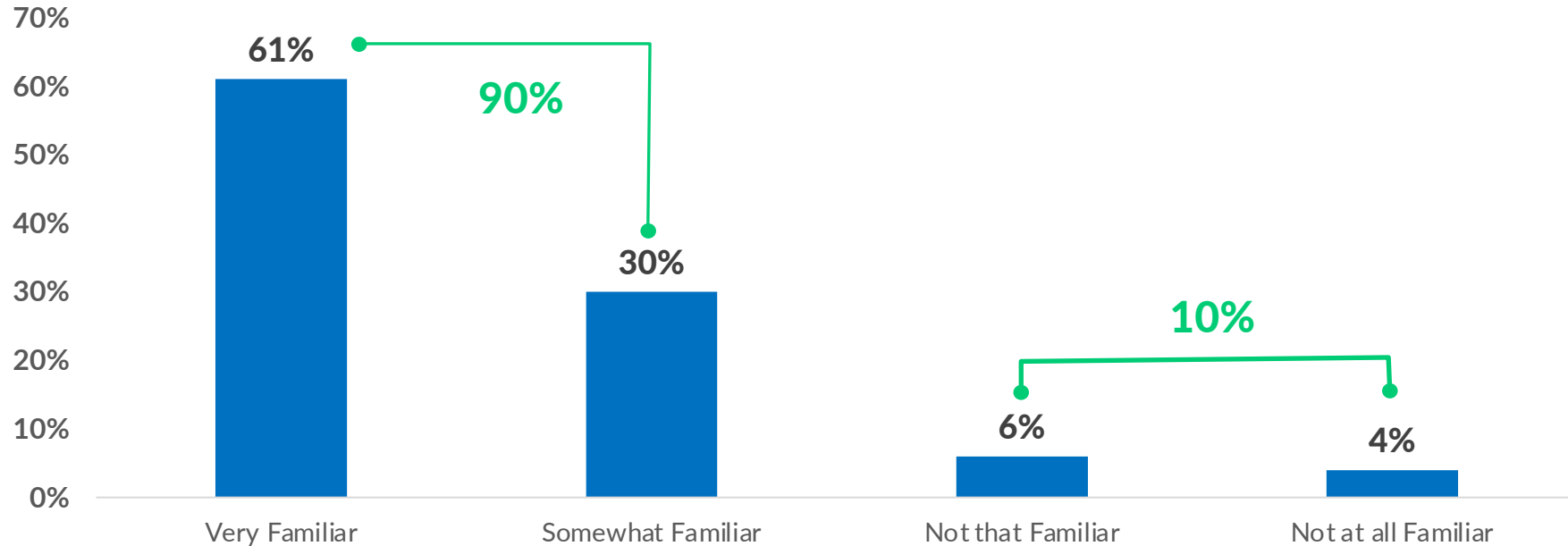




Detailed Findings



Nine in ten senior executives say they are familiar with the concept of Value Stream Management (VSM) with three in five very familiar with it.

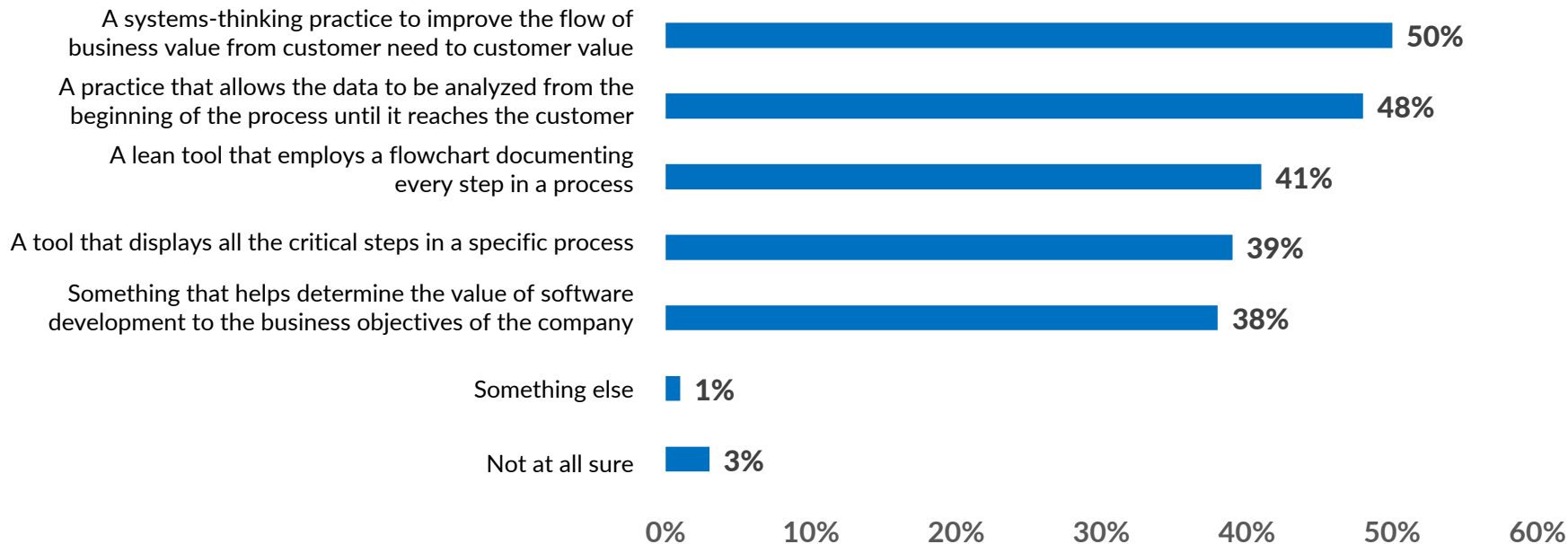


Q1 How familiar are you with the concept of Value Stream Management (VSM)?

Senior executives from Australia are more likely than those from the other 5 countries to say they are familiar with VSM.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Familiar (NET)	90	100	81	94	87	93	86
Very Familiar	61	69	38	72	47	72	66
Somewhat Familiar	30	31	43	22	40	21	20
Not Familiar (NET)	10	0	19	6	13	7	14
Not That Familiar	6	0	12	3	9	4	5
Not At All Familiar	4	0	7	3	4	3	9


Half of senior executives say VSM is a systems-thinking practice, but almost half say it is something else, and two in five view it as a flowchart tool – showing confusion over what the term means.



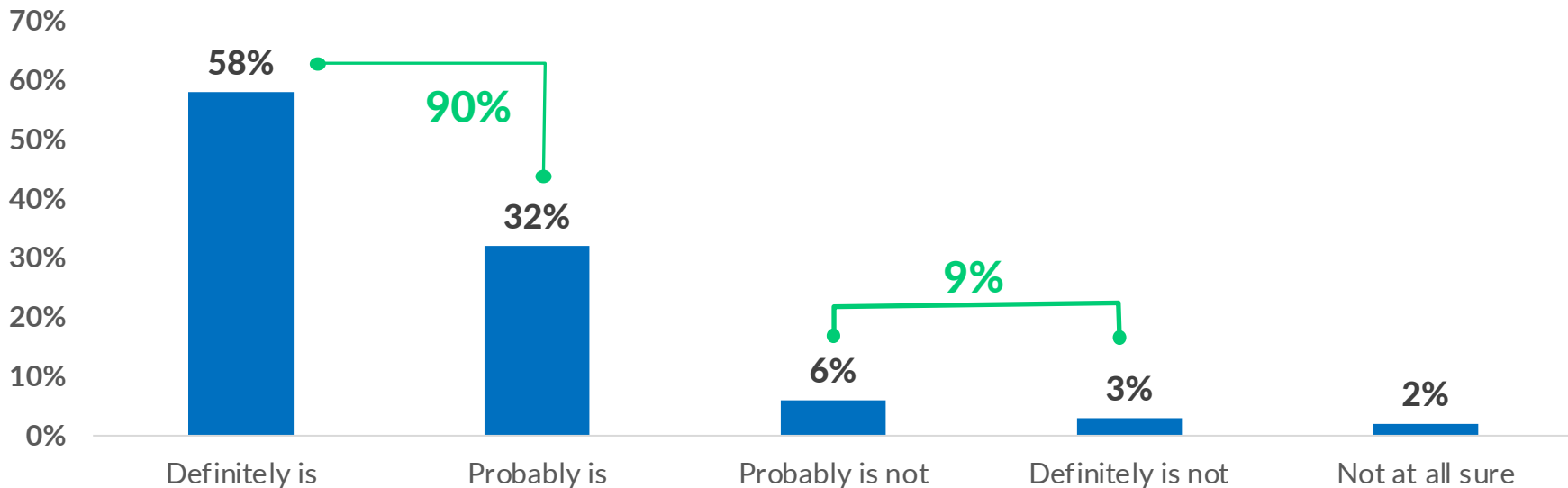
Q2 What does Value Stream Management (VSM) mean to you?

Senior executives in Australia, Germany, Spain, the UK, and the US are more likely than those from France to say VSM means a systems-thinking practice to improve the flow of business value from customer need to customer value.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
A system-thinking practice to improve the flow of business value from customer need to customer value	50	57	28	59	47	57	53
A practice that allows the data to be analyzed from the beginning of the process until it reaches the customer	48	58	42	51	44	42	50
A lean tool that employs a flowchart documenting every step in a process	41	63	23	47	38	36	41
A tool that displays all the critical steps in a specific process	39	48	38	46	29	38	32
Something that helps determine the value of software development to the business objectives of the company.	38	55	28	49	22	34	40
Something else	1	0	1	1	0	1	0
Not at all sure	3	0	6	3	0	4	7

 Q2 What does Value Stream Management (VSM) mean to you?

When provided with the definition of VSM, nine in ten senior executives say they are currently using it, with almost three in five saying they definitely are.



Q3 For the purposes of this survey, Value Stream Management (VSM) means a systems-thinking practice to improve the flow of business value from customer need to customer value. With this definition in mind, is your organization currently using VSM?



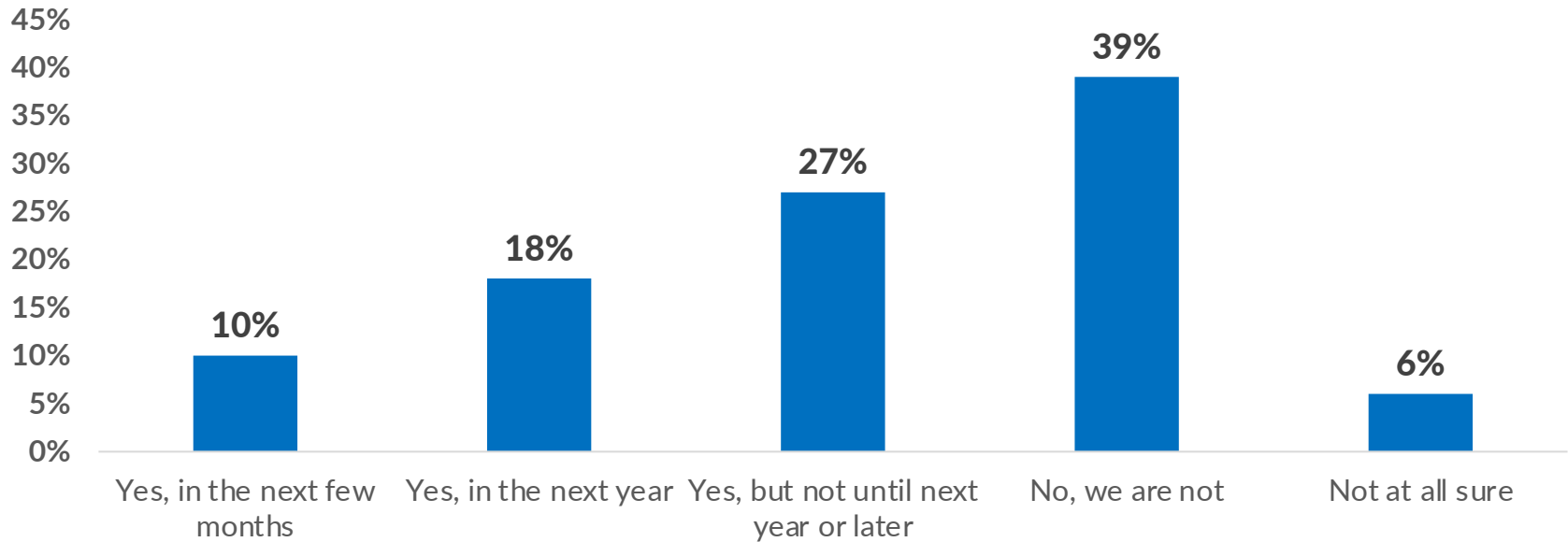
German, British and American senior executives are more likely than Australian, French and Spanish senior executives to say their organization is definitely using VSM.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Is Using (NET)	90	97	84	95	87	91	85
Definitely is	58	51	46	70	46	68	67
Probably is	32	46	38	25	41	23	18
Is Not Using (NET)	9	3	12	5	10	8	13
Probably is not	6	3	5	1	9	6	9
Definitely is not	3	0	7	4	1	2	4
Not at all sure	2	0	4	0	3	1	2



Q3 For the purposes of this survey, Value Stream Management (VSM) means a systems-thinking practice to improve the flow of business value from customer need to customer value. With this definition in mind, is your organization currently using VSM?

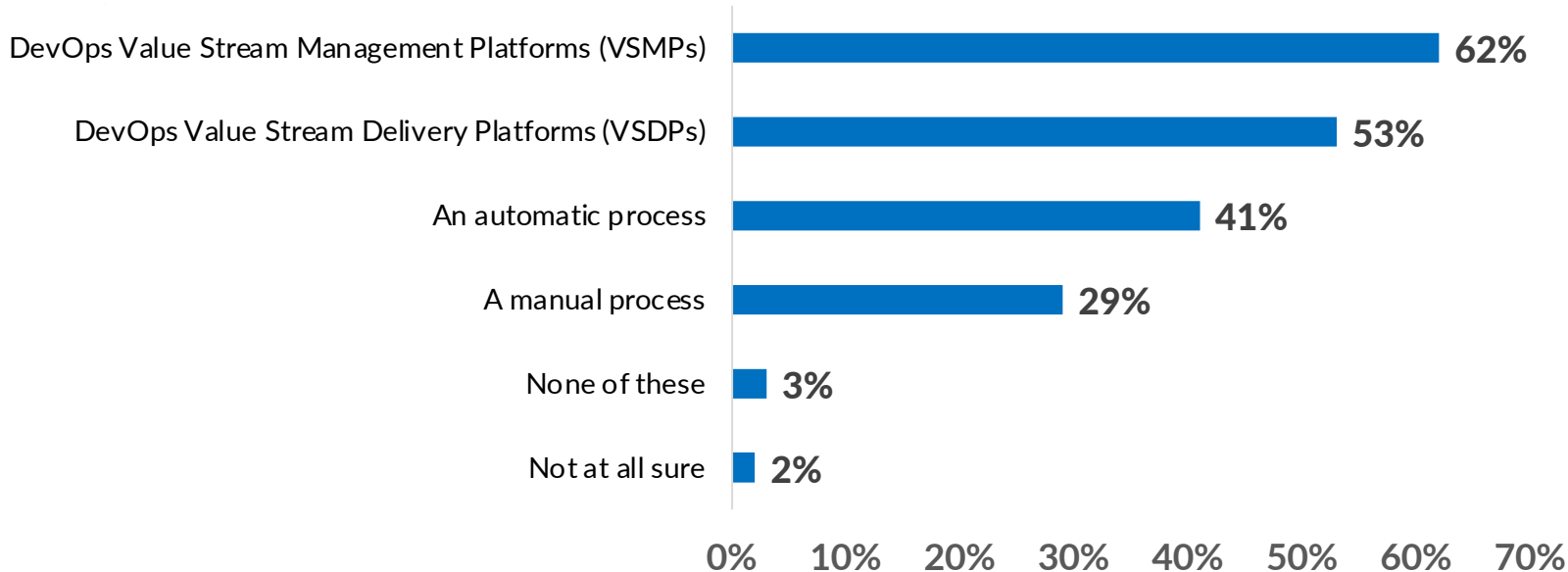
Among the small number who say their organization is not currently using VSM, over half (55%) say they are looking to implement while two in five say they are not.



Q4 Are you looking to implement VSM in your organization? Base Not Using VSM, N=51. Caution, very small base. Unable to look at individual countries.



Over three in five senior executives are currently using DevOps VSMPs while over half are using DevOps VSDPs.



Q5 Are you currently using any of these? Please select all that apply.



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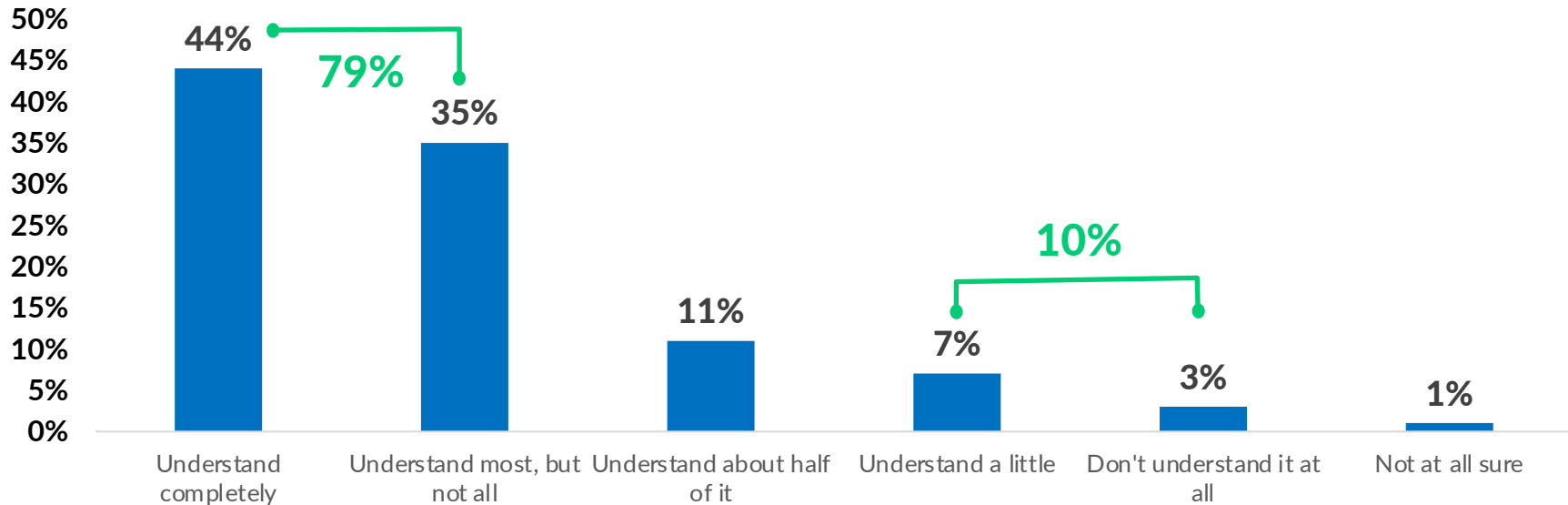
Senior executives in Australia, Germany, Spain, the UK and the US are more likely than those in France to say they are using VSMPs while those in Australia, France, Germany, the UK, and the US are more likely than those in Spain to say they are using VSDPs.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
DevOps Value Stream Management Platforms (VSMPs) which optimize end-to-end product delivery lead time and provide greater visibility and traceability into the flow of all product delivery processes, from ideation to release and operation.	62	69	51	64	60	68	62
DevOps Value Stream Delivery Platforms (VSDPs) which enable continuous delivery of software, build automation and continuous integration.	53	59	48	68	36	59	49
An automatic process	41	45	38	42	33	45	43
A manual process	29	35	14	38	17	29	40
None of these	3	0	5	2	4	1	5
Not at all sure	2	0	5	1	2	1	1



Q5 Are you currently using any of these? Please select all that apply.

While four in five senior executives say senior corporate leaders generally understand what VSM is and what it does, over two in five say they understand it completely while over one-third say they understand most, but not all of it.



Q6 How much, if at all, do you think senior corporate leaders in general actually understand what VSM is and what it does?



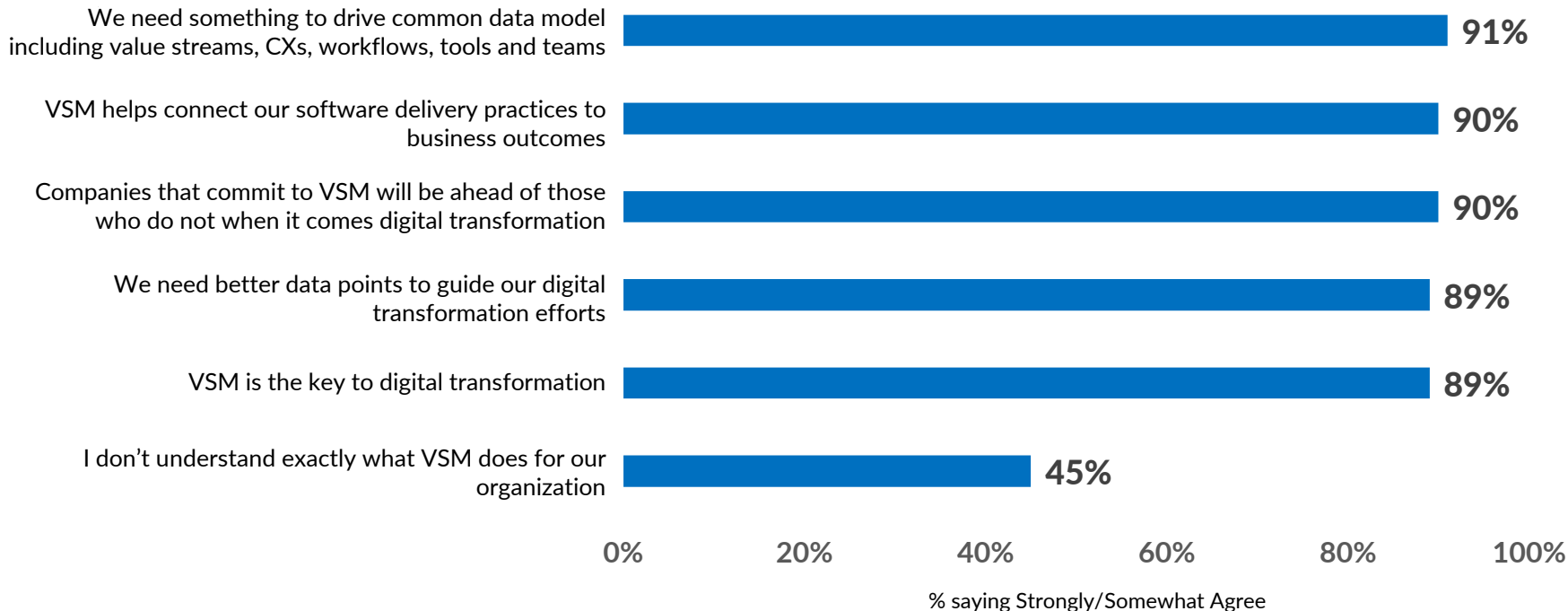
Australian and German senior executives are more likely than French, Spanish, British and American ones to say senior corporate leaders understand what VSM is and does.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Understand (NET)	79	86	73	89	72	78	73
Understand completely	44	42	32	64	26	44	53
Understand most, but not all	35	44	41	25	46	34	20
Understand about half of it	11	10	13	7	15	8	13
Don't Understand (NET)	10	4	10	4	13	14	13
Understand a little	7	4	6	3	10	8	9
Don't understand at all	3	0	4	1	3	6	4
Not at all sure	1	0	4	0	0	0	1



Q6 How much, if at all, do you think senior corporate leaders in general actually understand what VSM is and what it does?

Nine in ten senior executives say they need better data points to guide their digital transformation efforts.



Over half of senior executives strongly agree that VSM helps connect their software delivery practices to business outcomes.

	Agree (NET)	Strongly Agree	Somewhat Agree	Disagree (NET)	Somewhat Disagree	Strongly Disagree
	%	%	%	%	%	%
We need something to drive a common data model including value streams, CXs, workflows, tools and teams	91	47	44	9	8	1
VSM helps connect our software delivery practices to business outcomes	90	53	38	10	8	2
Companies that commit to VSM will be ahead of those who do not when it comes to digital transformation	90	51	39	10	9	2
We need better data points to guide our digital transformation efforts	89	50	40	11	9	2
VSM is the key to digital transformation	89	50	39	12	10	2
I don't understand exactly what VSM does for our organization	45	22	24	55	21	34



Q7 How strongly do you agree or disagree with the following statements?



Senior executives in Australia and Germany are more likely than those from France, Spain, the UK and the US to say they don't understand exactly what VSM does for their organization.

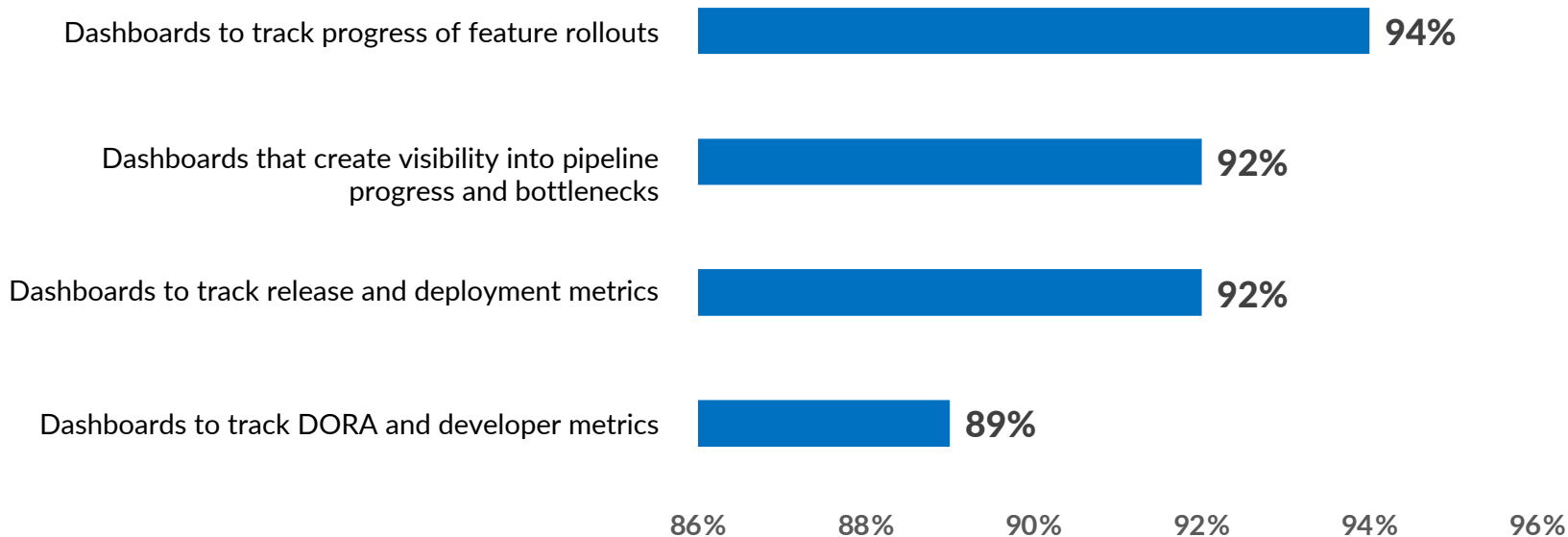
Those Saying "Strongly/Somewhat Agree"	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
We need something to drive a common data model including value streams, CXs, workflows, tools and teams	91	95	89	85	95	88	93
VSM helps connect our software delivery practices to business outcomes	90	94	83	86	93	95	90
Companies that commit to VSM will be ahead of those who do not when it comes to digital transformation	90	90	83	90	92	91	92
We need better data points to guide our digital transformation efforts	89	94	82	88	93	87	90
VSM is the key to digital transformation	89	96	84	85	90	87	89
I don't understand exactly what VSM does for our organization	45	61	43	64	34	38	31



Q7 How strongly do you agree or disagree with the following statements?



At least nine in ten senior executives think each of these are important to their organization.



Q8 How important are each of these to your organization?



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At least half of senior executives say each of these is very important to their organization.

	Important (NET)	Very Important	Somewhat Important	Not Important (NET)	Not that Important	Not at all Important
	%	%	%	%	%	%
Dashboards to track progress of feature rollouts	94	51	43	6	5	1
Dashboards that create visibility into pipeline progress and bottlenecks	92	59	33	8	6	2
Dashboards to track Release and Deployment metrics	92	53	40	8	6	2
Dashboards to track DORA and developer metrics	89	49	41	11	9	3



Q8 How important are each of these to your organization?



While senior executives in all these countries have similar feelings on how important each of these are to their organization, there are differences in intensity of that importance.

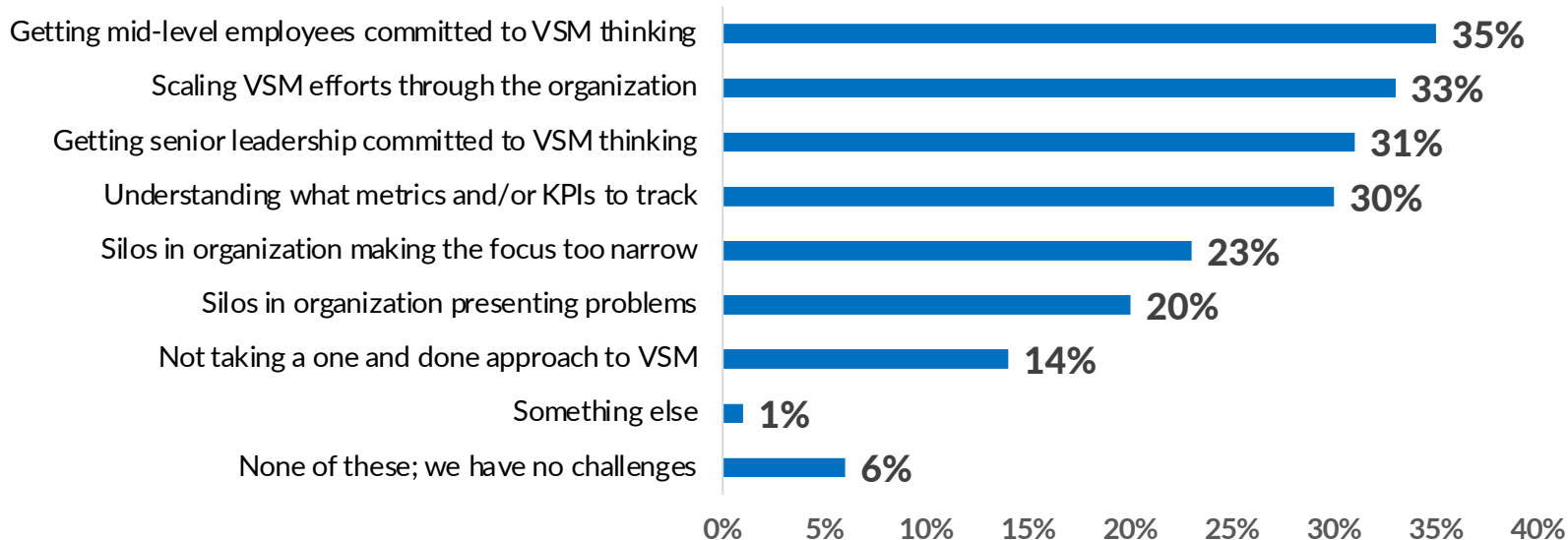
Those Saying “Very/Somewhat Important”	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Dashboards to track progress of feature rollouts	94	96	97	90	89	92	98
Dashboards that create visibility into pipeline progress and bottlenecks	92	93	92	92	92	90	95
Dashboards to track Release and Deployment metrics	92	97	93	90	90	87	97
Dashboards to track DORA and developer metrics	89	93	85	87	94	87	88



Q8 How important are each of these to your organization?



According to senior executives, getting mid-level employees committed to VSM thinking and scaling VSM efforts through the organization are the top two roadblocks and/or challenges to fully adopting VSM.



Q9 What are the main roadblocks and/or challenges to fully adopting VSM for your organization? While all may be challenges please select only the two main ones.



Senior executives in Australia, Spain, the UK and the US are more likely than those in France and Germany to say the main roadblock is getting senior leadership committed to VSM thinking.

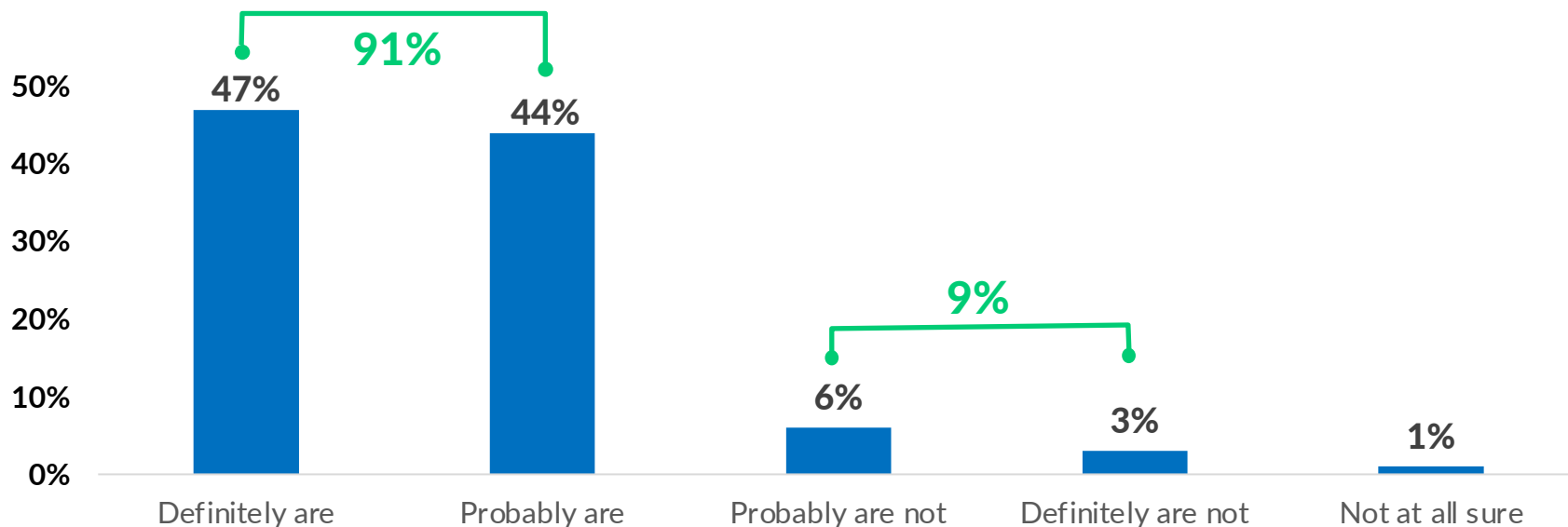
	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Getting mid-level employees committed to VSM thinking	35	31	33	35	42	36	35
Scaling VSM efforts through the organization	33	29	38	39	35	25	34
Getting senior leadership committed to VSM thinking	31	37	26	22	34	35	34
Understanding what metrics and/or KPIs to track	30	27	30	39	33	28	24
Silos in organization making the focus too narrow	23	32	17	27	20	23	17
Silos in organization presenting problems	20	26	14	18	16	24	21
Not taking a one and done approach to VSM	14	10	18	12	18	13	11
Something else	1	0	0	0	0	1	3
None of these; we have no challenges	6	4	12	4	1	7	9



Q9 What are the main roadblocks and/or challenges to fully adopting VSM for your organization? While all may be challenges please select only the two main ones.



Nine in ten senior executives say their organization is able to digest data from multiple teams and tools into single value streams to actually help guide their digital transformation, with almost half saying they definitely are.




Q10 Is your organization currently able to ingest data from multiple teams and tools into single value streams to actually help guide your digital transformation?

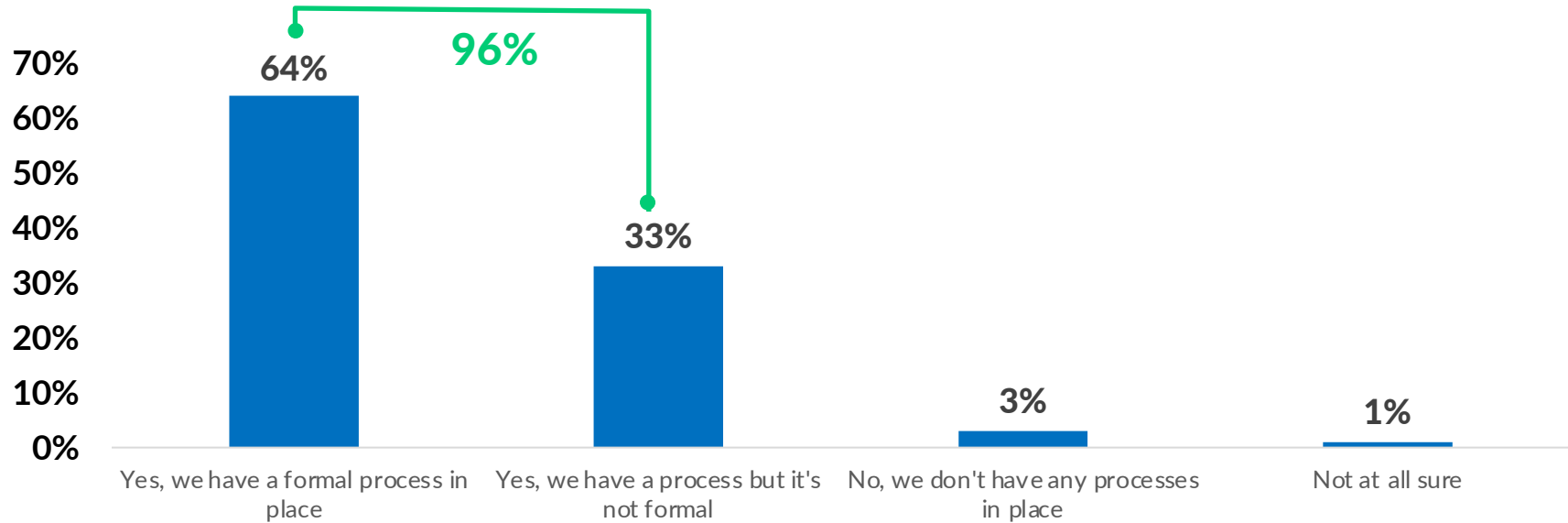


Australian senior executives are more likely than those from other countries to say their organization is currently able to ingest data from multiple teams and tools into single value streams to actually help guide their digital transformation.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Able to ingest data (NET)	91	97	87	93	89	90	88
Definitely are	47	47	30	59	32	50	61
Probably are	44	50	57	34	57	40	27
Not able to ingest data (NET)	9	3	12	7	11	10	10
Probably are not	6	2	11	5	9	5	6
Definitely are not	3	1	1	2	2	5	4
Not at all sure	1	0	1	0	0	0	2

 Q10 Is your organization currently able to ingest data from multiple teams and tools into single value streams to actually help guide your digital transformation?

Just about all senior executives say they have an established process in place for digital transformation with almost two-thirds saying it is a formal process.



Q11 Do you have an established process in place for digital transformation?




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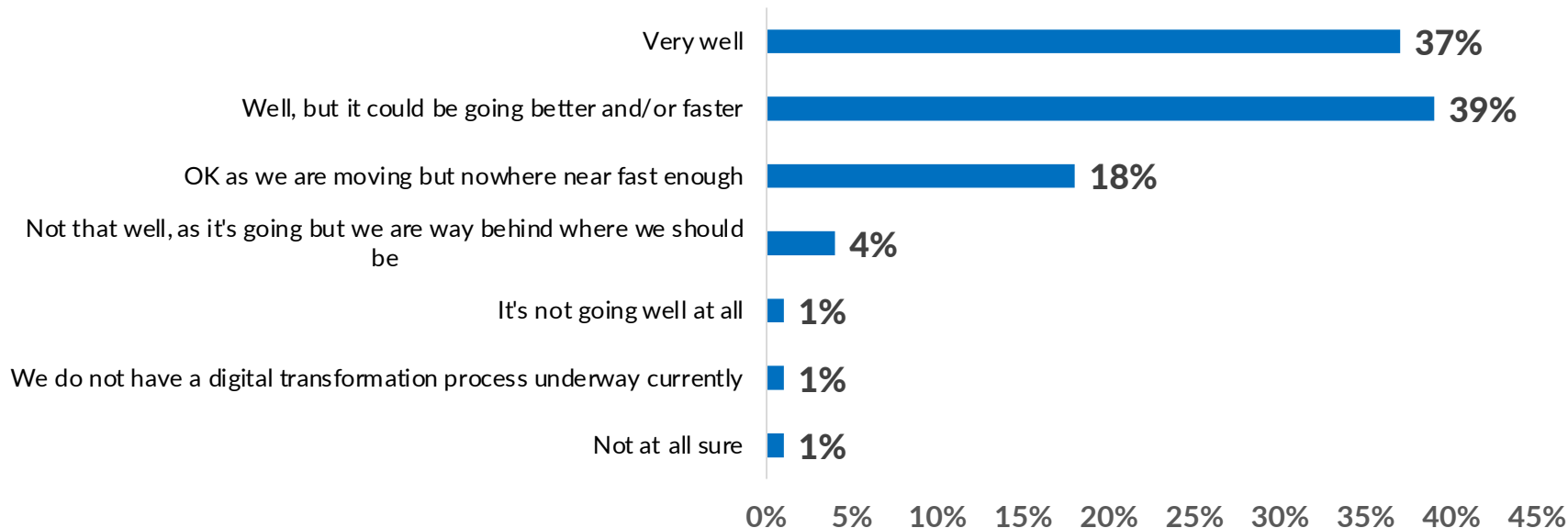
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Senior executives in Australia, Germany, the UK and the US are more likely than those in France and Spain to say they have a formal process in place for digital transformation while those in Spain are more likely to say they have a process but it isn't formal.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Yes, there is a process (NET)	96	100	91	96	98	95	97
Yes, we have a formal process in place	64	68	54	71	52	67	69
Yes, we have a process but it's not formal	33	32	37	25	46	28	28
No, we don't have any processes in place	3	0	7	4	1	4	2
Not at all sure	1	0	2	0	1	1	1

 Q11 Do you have an established process in place for digital transformation?

While three-quarters of senior executives (76%) say their digital transformation process is going well, only 37% say it is going very well.



Q9 What are the main roadblocks and/or challenges to fully adopting VSM for your organization? While all may be challenges please select only the two main ones.



Senior executives in Australia, Germany, Spain, the UK and the US are more likely than those in France to say their digital transformation is currently going well.

	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Well (NET)	76	80	57	86	73	76	81
Very well	37	37	25	58	21	40	41
Well, but it could be going better and/or faster	39	43	32	28	52	36	40
OK as we are moving but nowhere near fast enough	18	18	32	9	19	16	15
Not Well (NET)	5	2	8	4	7	7	1
Not that well, as it's going but we are way behind where we should be	4	1	5	4	7	5	1
It's not going well at all	1	1	3	0	0	2	0
We do not have a digital transformation underway currently	1	0	1	1	0	1	3
Not at all sure	1	0	2	0	1	0	0



Q11 Do you have an established process in place for digital transformation?

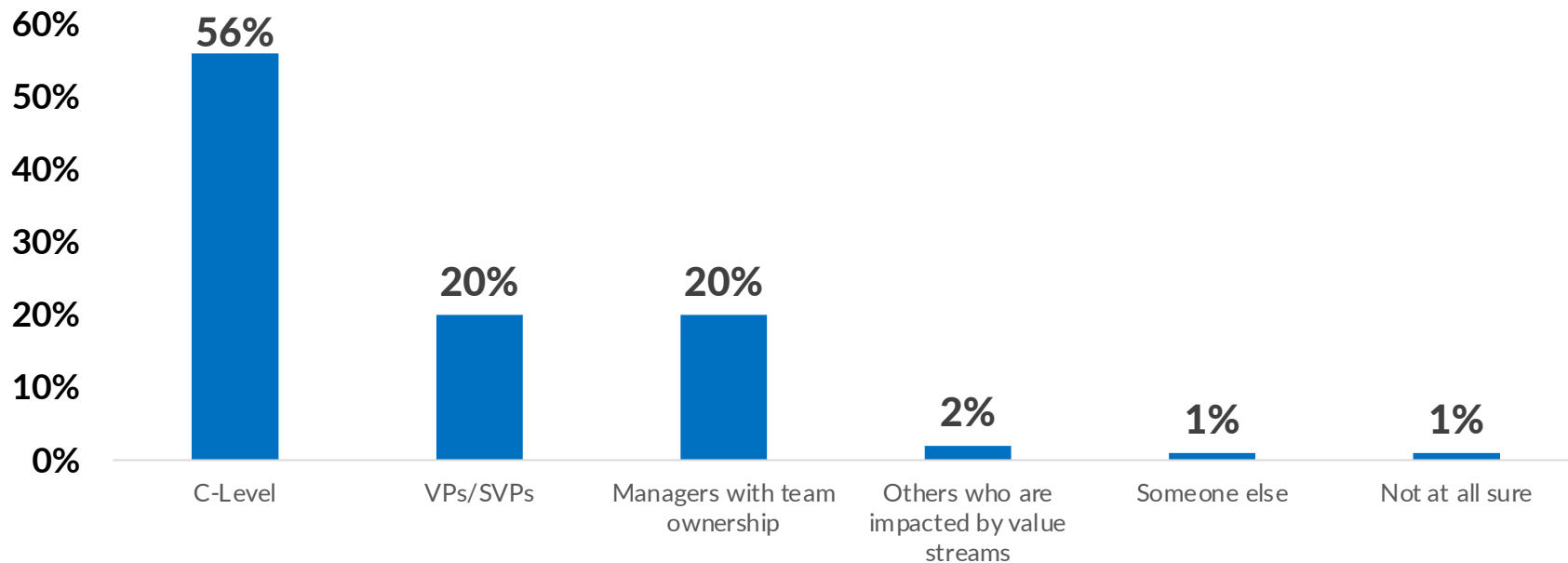


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Over half of senior executives say final business decisions on VSM are made at the C-level.



Q13 In your organization, who makes the business decisions on VSM? While many may make related decisions, please select the role that makes the final decision.



Senior executives in Australia, Germany, the UK and the US are more likely than those in France and Spain to say the final business decisions on VSM are made at the C-level.

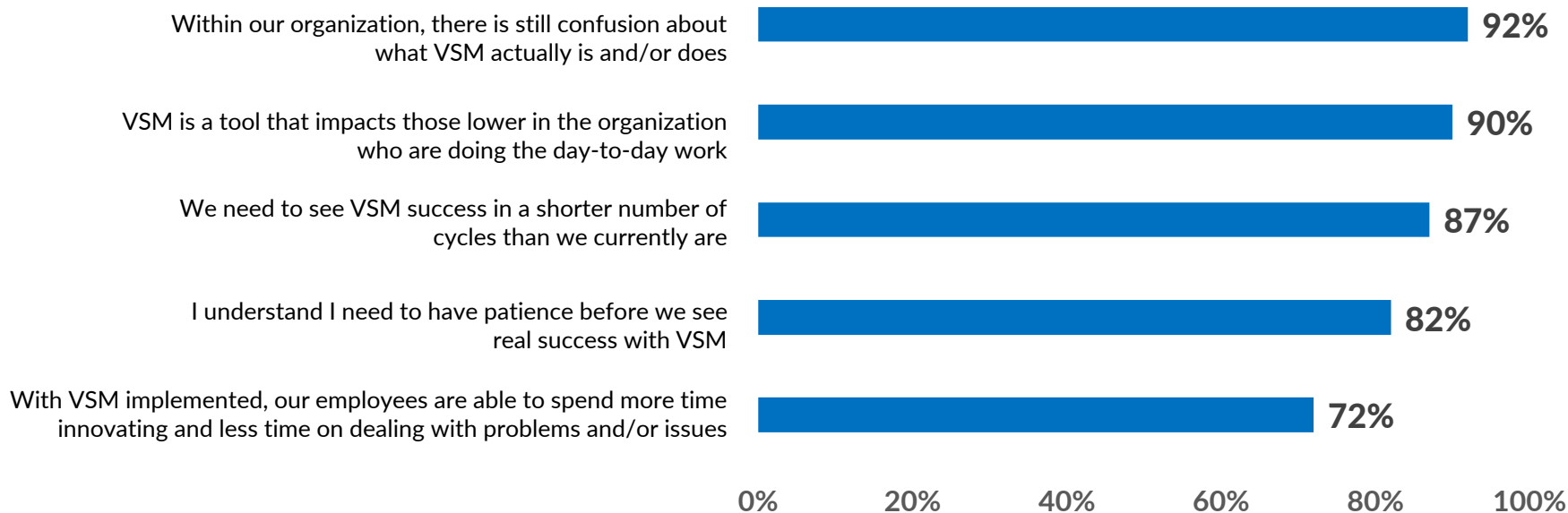
	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
Well (NET)	76	80	57	86	73	76	81
Very well	37	37	25	58	21	40	41
Well, but it could be going better and/or faster	39	43	32	28	52	36	40
OK as we are moving but nowhere near fast enough	18	18	32	9	19	16	15
Not Well (NET)	5	2	8	4	7	7	1
Not that well, as it's going but we are way behind where we should be	4	1	5	4	7	5	1
It's not going well at all	1	1	3	0	0	2	0
We do not have a digital transformation underway currently	1	0	1	1	0	1	3
Not at all sure	1	0	2	0	1	0	0



Q11 Do you have an established process in place for digital transformation?



Almost three-quarters of senior executives say, within their organization, there is still confusion about what VSM actually is and/or does.



Q14 How strongly do you agree or disagree with the following statements?



Over nine in ten senior executives say with VSM implemented, their employees are able to spend more time innovating and less time dealing with problems and/or issues.

	Agree (NET)	Strongly Agree	Somewhat Agree	Disagree (NET)	Somewhat Disagree	Strongly Disagree
	%	%	%	%	%	%
With VSM implemented, our employees are able to spend more time innovating and less time on dealing with problems and/or issues	92	48	44	9	7	2
I understand I need to have patience before we see real success with VSM	90	50	40	10	7	3
We need to see VSM success in a shorter number of cycles than we currently are	87	42	45	13	11	2
VSM is a tool that impacts those lower in the organization who are doing the day-to-day work	82	40	42	18	14	4
Within our organization, there is still confusion about what VSM actually is and/or does	72	34	38	28	18	11



Q14 How strongly do you agree or disagree with the following statements?



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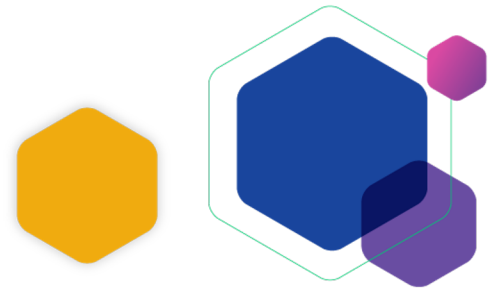
Senior executives in each of the six countries respond to these these statements similarly.

Those saying “Strongly/Somewhat Agree”	Total	Australia	France	Germany	Spain	UK	US
	%	%	%	%	%	%	%
With VSM implemented, our employees are able to spend more time innovating and less time on dealing with problems and/or issues	92	92	85	89	96	94	93
I understand I need to have patience before we see real success with VSM	90	95	87	90	91	85	93
We need to see VSM success in a shorter number of cycles than we currently are	87	87	82	84	91	89	88
VSM is a tool that impacts those lower in the organization who are doing the day-to-day work	82	85	80	81	76	84	86
Within our organization, there is still confusion about what VSM actually is and/or does	72	80	66	72	69	70	73



Q14 How strongly do you agree or disagree with the following statements?





Methodology & Demographics



Methodology

- CloudBees commissioned Regina Corso Consulting to conduct a survey of senior executives in the U.S., U.K., Germany, France, Spain and Australia to understand how they feel about Value Stream Management (VSM).
- This survey is among 600 senior executives, vice presidents and higher from companies with at least 250 employees with 100 respondents each from Australia, France, Germany, Spain, the United Kingdom, and the United States.
- This survey was conducted online between July 8-21, 2022.
- *Notes for reading charts and tables:* Percentages may not add up to 100% due to rounding or because the question was a multiple response allowed item. Also an “*” indicates the response was less than 0.5%. Unless otherwise indicated, bases for all slides are of the total of 600 senior executives.

Demographics

- Age: 18-39=45%, 40-54=42%; and 55+=13%
- Gender Identity: Men=74%; Women=25%; Non-binary=1%, Gender non-conforming=*; and, prefer not to answer=*
- Size of company: 250-999 employees=52% and 1,000 or more employees=48%
- Title: SVP=8%; CEO=33%; CIO=23%; CTO=18%; COO=9%; and, other C-Suite title=10%
- Time as senior executive: 5 years or less=24%; 6-10 years=46%; 11-20 years=23% and over 20 years=8%

