

# 2025 VALUE STREAM MANAGEMENT TRENDS

A Global Survey of Executives and IT Leaders

January  
2025



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## Introduction

This paper reviews the worldwide utilization of Value Stream Management (VSM) and explores how this initiative will be employed to address business challenges and deliver customer value in 2025. The report delivers findings from a global research project, which featured surveys and in-depth interviews with executives and IT leaders. This research covered a range of topics, including current VSM adoption levels, digital transformation, metrics being used to measure and track customer value, teams participating in value stream initiatives, AI utilization, and solutions being used to facilitate VSM.

The research also investigated the everyday use of value streams, queried whether VSM delivers key benefits sought, and quantified actual benefits received in those organizations utilizing VSM on shipping products. The research also focused on the current business environment and key market trends, captured key business concerns and areas of strategic focus for 2025, and compared key survey findings from the previous three years to identify year-over-year trends.

## Executive Summary

This research finds that the top focus for 2025 is the customer lifecycle, specifically attracting new customers and delivering more customer value. The top challenges cited for companies in 2025 were adopting AI and managing data. When asked why their companies are adopting VSM, participants said it was specifically to deliver more customer value. Those already using VSM stated that this initiative has delivered improved data flow and decision-making. Those VSM benefits are directly correlated with the top business goals for 2025. Other benefits of VSM included increased visibility across the organization and advancing digital transformation (DT). In fact, every company pursuing a digital transformation strategy was also adopting VSM.

Conducted annually over the last four years, this research reveals a consistent increase in VSM utilization. Today, the majority of companies are using VSM across numerous product lines. However, as companies continue to increase VSM usage, several areas remain challenging. While more teams are participating in VSM, overall team involvement remains far too limited. As a result, there's a continued lack of alignment between business and development teams. Research, however, shows a significant increase in the participation of customer support teams. These teams are expected to help gather metrics to better understand the value customers actually receive.

90% of participants expect AI to deliver significant changes and improvements to VSM. Participants listed a multitude of benefits AI will deliver to VSM, such as increased automation and enhanced analytics, product quality, decision-making, and customer experience. The findings show that VSM data, customer value, and AI are intrinsically linked. Companies should be striving to measure, collect, and manage data at each step along the value stream, from initial strategy to delivery. That data must include a comprehensive mix of metrics representing customer value received, while the breadth of data and information enables the optimization of development and delivery.

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Optimized processes, in turn, drive increased customer value while minimizing costs and shortening time to market. AI can aid data collection, analysis, and data-driven decision-making. This is prompting digital transformation and VSM professionals to make a significant increase in solution and platform deployments in 2025. These new tools are commercially focused VSM solutions, which will likely include AI. This not only helps in data collection and data flow but also provides value to each team along the value stream, driving improvements in alignment and, ultimately, the customer value lifecycle, which is the top business focus for 2025.

## Key Findings

- VSM Delivers Increased Customer Value, Data Sharing, and Accelerates Digital Transformation.
  - Top business focus is the customer value lifecycle of attracting and keeping customers.
  - Adopting AI and managing data lead business challenges.
  - VSM is being utilized to drive increased customer value.
  - Improved data flow and better decisions lead all VSM benefits
  - Every company pursuing digital transformation has adopted, or plans to adopt, VSM.
- Companies Mature but Still Struggle with Visibility, Team Alignment, and Measuring Customer Value.
  - Companies continue to mature, with most having multiple shipping products leveraging VSM.
  - Numerous teams are involved in VSM, with a significant increase in participation by customer service teams.
  - Companies failing to align between business strategy and software development.
- AI Expected to Enable and Accelerate VSM Benefits, Encouraging More VSM Tool Deployments in 2025
  - 90% expect AI to deliver strong impact on VSM.
  - AI is fueling such VSM benefits as more automated workflows and improved analytics, product quality, decision-making, and more.
  - Companies are increasing tool deployments to support VSM initiatives.

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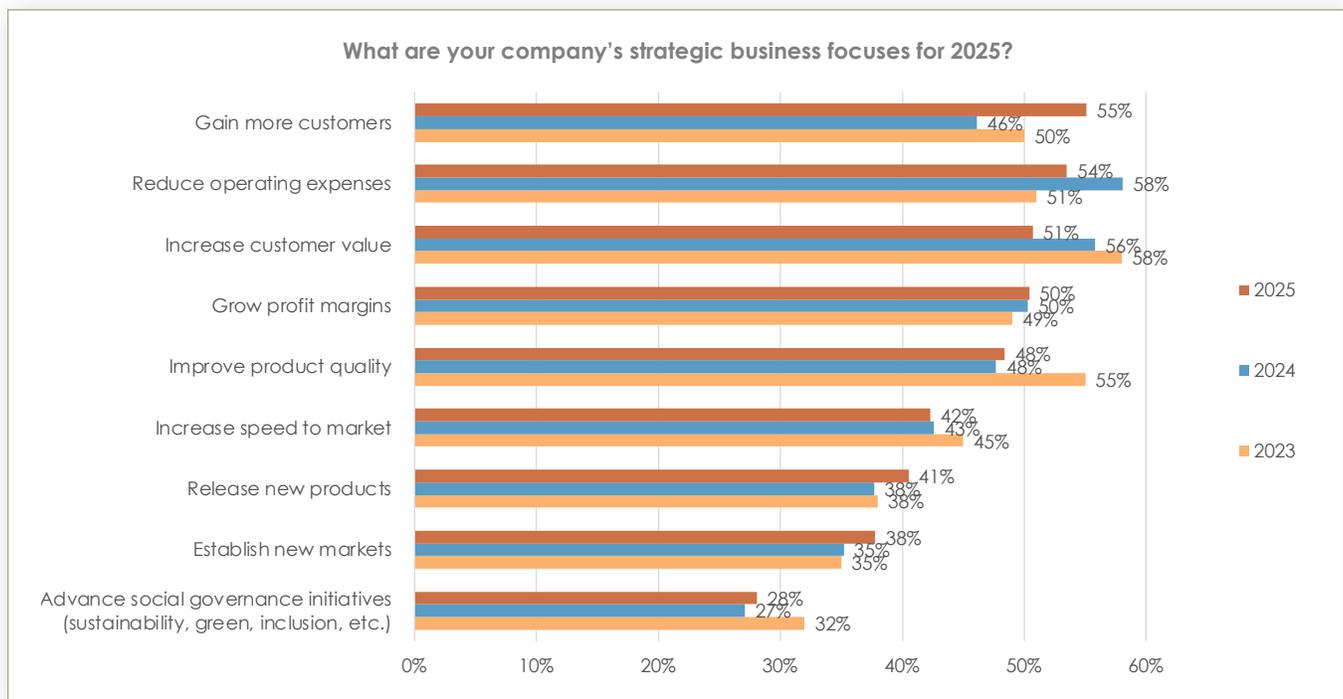
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## Detailed Findings

### Customer Lifecycle Redefining the Business Trifecta

Historically, the leadership mantra has been to boost sales, lower costs, and increase profits, the classic business trifecta. However, last year's data reported a new business trifecta, which has been validated again in this year's data. In this new trifecta, customer value has replaced increased profits. As companies share their strategic leadership focus for 2025, the customer lifecycle of gaining and retaining customers appears in the two of out the top three, in the chart below.

Gaining more customers (55%) drives sales and revenue which has always been a business objective, but keeping customers is difficult. And increasing customer value (51%) is the mechanism to retain customers. Thus, in 2025 companies are focused on increasing the value customers receive in order to attract new customers and retain existing ones, which in turn enables the classic focus on more sales, lower costs, and increased profits.



"If you are doing value streams and VSM correctly, customer value is the top objective. Sales, revenue, efficiencies, and profits will follow."  
—Executive (IT and Business Operations), Healthcare Provider



"Competition is harder than ever, and it is now easier for customers to switch, and they are willing to do it. If you don't focus on your customer, they won't be one for long."  
—CMO, Technology Company

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## The Hurdles of AI, Managing Data, Inefficiencies, and Measuring Value

When business leaders were asked what stands in the way of achieving their business objectives, the top challenge was adopting AI (56%). Perhaps this finding is not surprising as AI continues to be the hot technology that promises many business efficiencies and competitive benefits. In the second spot is managing data (48%), which is not only key for making informed decisions, but critical for feeding information to the AI models teams are focused on deploying. Rounding out the top three is inefficient processes (39%)—a challenge digital transformation has long sought to address. This finding indicates that significant transformation opportunities remain. Next is the difficulty in understanding the value their company’s products deliver to the customer (35%), which directly correlates to the customer lifecycle focus for 2025. In fact, most of these challenges directly inhibit the top business objectives discussed in the section above.



“Competitors are fierce now, and thus focus on efficiencies is constant. New technologies, new business environments, and new offerings constantly affect the processes you have. Often initial adoption comes with inherent inefficiencies that need to get worked out over time.”  
—CIO, Manufacturing



“We are seeing AI deliver value, but much of what we started with was low hanging fruit, what others have done. Now we need to find unique ways to use AI to create differentiation. But to fuel AI you need data, not just external information but metrics on how your products, teams, and processes perform.”  
—CTO, Global Financial Institution

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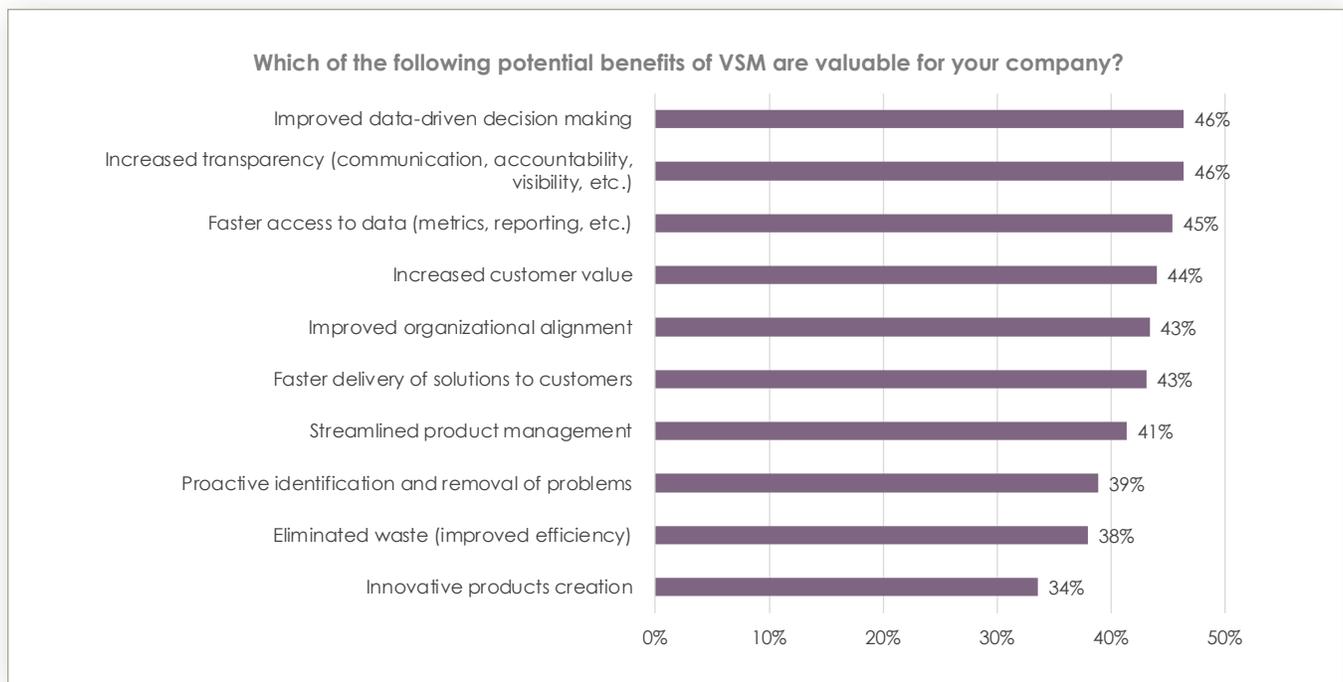
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## Data, Visibility, and Customer Value Top List of VSM Benefits Desired

The research sought to understand which potential benefits of VSM were attracting companies. The first and third answers revolve around data for improved decision making (46%) and faster access to data (45%). As discussed in the preceding sections, data is needed to support AI and decision making. Tied for the top answer at 46% is increased transparency, as visibility is needed to capitalize on opportunities for improving business process efficiency, data collection, and alignment. Just following, at 44%, is increasing customer value. Nearly all of the expected benefits are not only aligned with the top business focuses of 2025 but are key enablers to overcome business challenges cited in this report.



“VSM is providing visibility and performance metrics at each step, delivering the insights to make informed decisions.”  
—VP, Retail Company



“VSM in hindsight was really about aligning everyone internally. The leaders of every team now speak differently in every meeting. We understand how other teams deliver value, and there is more mutual respect. Meetings focus on, ‘how does what we do benefit the customer or the business?’ If we don’t have an answer for that, we try to stop doing it.”  
—CIO, Manufacturing

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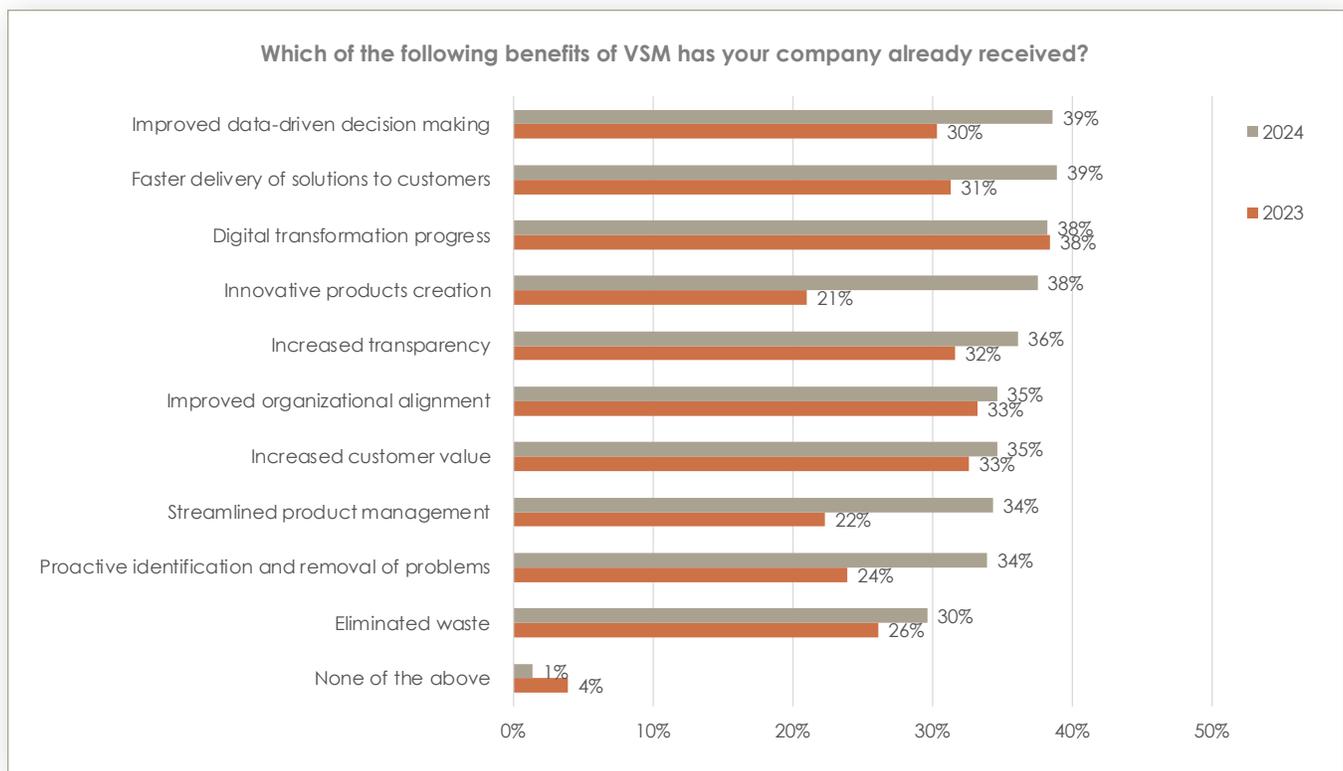
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## VSM Delivering Increasing Value Over Time

Unfortunately, the reality for many organizations is the anticipated benefits from technology investments don't always materialize. To provide facts about VSM benefits, companies were asked what measurable benefits their VSM initiatives actually delivered. The chart below compares the answers from the last two years. Our first observation of this chart is that the tan bars, which represent value received in 2024, are significantly longer than the prior year, providing a strong indication that VSM value in numerous areas is growing. This finding reveals that as companies continue their VSM adoption and maturation, additional benefits are gained. The top nine answers are only separated by five percentage points, indicating diverse benefits in several areas are being realized. Leading all benefits received are improved data-driven decision making (39%) and faster solution delivery (39%). Increased transparency (36%) and increased customer value (35%) also were highly ranked. All of these benefits align with key 2025 goals and enable companies to overcome key challenges. Digital transformation progress (38%) also shows up high on the list, appearing in the third spot, with identical year-over-year percentages, showing that VSM is consistently accelerating digital transformation initiatives.



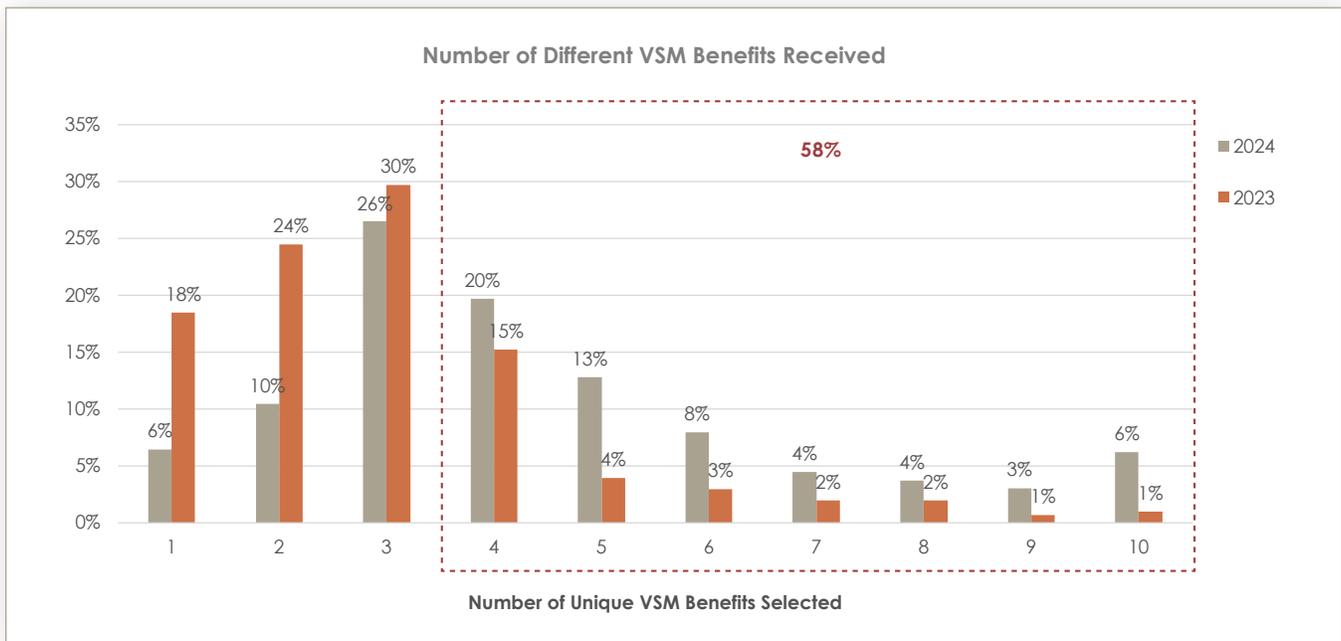
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An additional way to look at the value VSM is delivering is to assess how many different business benefits participants indicated their company received. For benefits received in 2024, 58% selected four or more. In fact, as outlined in the chart below, every 2024 bar in the red box is higher than in 2023, showing VSM value grows over time and expands into new areas.



“We went into VSM hopeful but guarded we hoped could get value in a couple of areas, which we did. But looking back over a couple of years, it is clear the value of alignment and visibility is delivering a lot more value than expected.”

—CTO, Global Financial Institution



“It's hard to put a direct measure on how VSM helps digital transformation. I think it [VSM] really helps us know what to digitize and focus on by prioritizing what delivers the most value overall.”

—Executive (IT and Business Operations), Healthcare Provider

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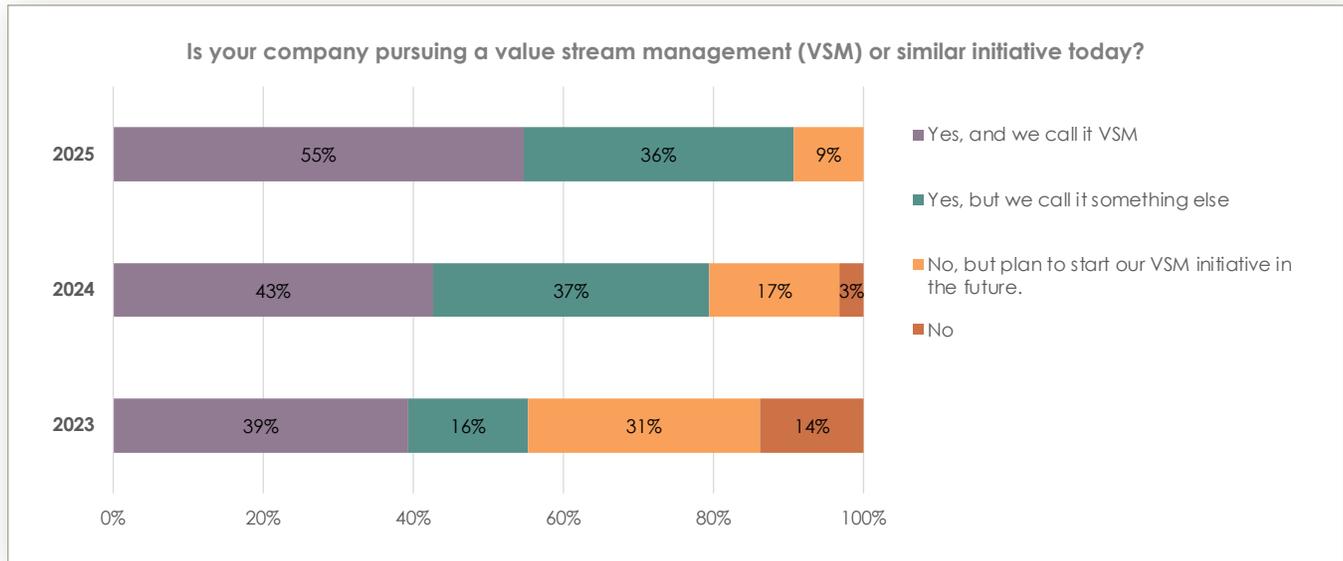
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## Every Company Pursuing Digital Transformation Will Deploy VSM

Another interesting data point supporting the value VSM delivers toward digital transformation can be deduced from the following chart. Every company who participated in this survey had a VSM and/or digital transformation initiative underway. In looking at the top bar for 2025, every company has or will have a VSM initiative. Respondents in companies that already have VSM would obviously select one of the “Yes, we have VSM” answers. Thus, only companies pursuing digital transformation would have the option of selecting “no” to VSM, as they did in 2023 and 2024. However, there are zero “no” answers in 2025, resulting in every company with a digital transformation project has, or is planning to have, a VSM initiative, verifying that VSM is a catalyst for digital transformation.



“VSM puts the data in context. What and how we do digital transformation is derived from opportunities to improve from looking at a product through the VSM lens.”

—Executive (IT and Business Operations), Healthcare Provider



“Internally, the concepts are simple: VSM changes how you think and what you prioritize, and DT (digital transformation) ensures we use technology do that as efficiently as possible. Honestly, we don’t use either term [DT or VSM] anymore, it is just our new normal.”

—CTO, Global Financial Institution

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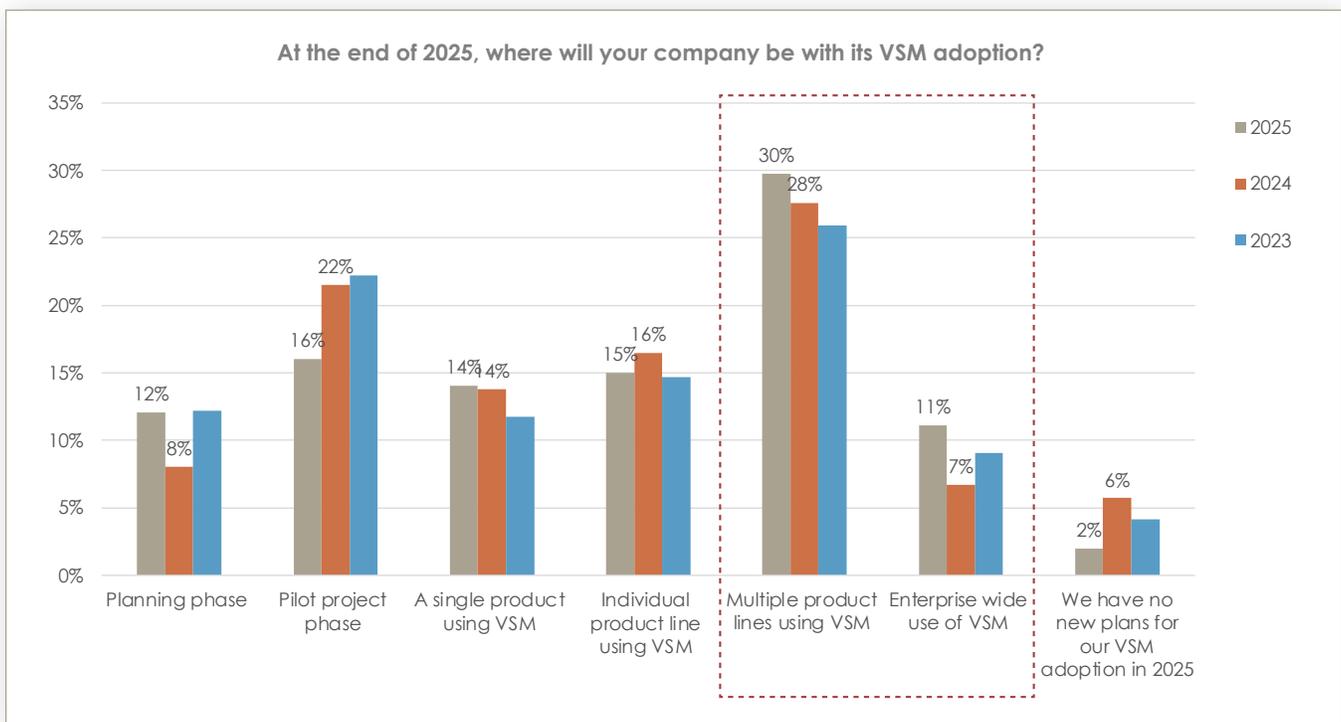
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## Growing VSM Maturity and Momentum

An earlier section discussed VSM benefits received, and revealed how those gains have been increasing in successive years. These findings provide an indirect indicator of growing VSM adoption and maturity. To establish a definitive finding, participants were asked where their company will be with VSM utilization at the end of 2025. The year-over-year chart below provides direct evidence of growing development and maturity. The bars in the red box show sequential growth in “multiple products lines using VSM,” as well as momentum in “enterprise-wide use of VSM.” This data validates findings earlier in the paper that revealed VSM use is expanding and delivering increasing benefits which are the business indicators of growing maturity.



“We saw tangible and intangible value from the pilot VSM project and the follow-on project. Now, VSM will be rolled out to every product and every team.”

—CIO, Manufacturing



“Each product process is being sequentially looked at to increase value and the lifetime value of the customer. We prioritize by revenue generally, but new technologies and M&A can reshuffle those.”

—CMO, Technology Company

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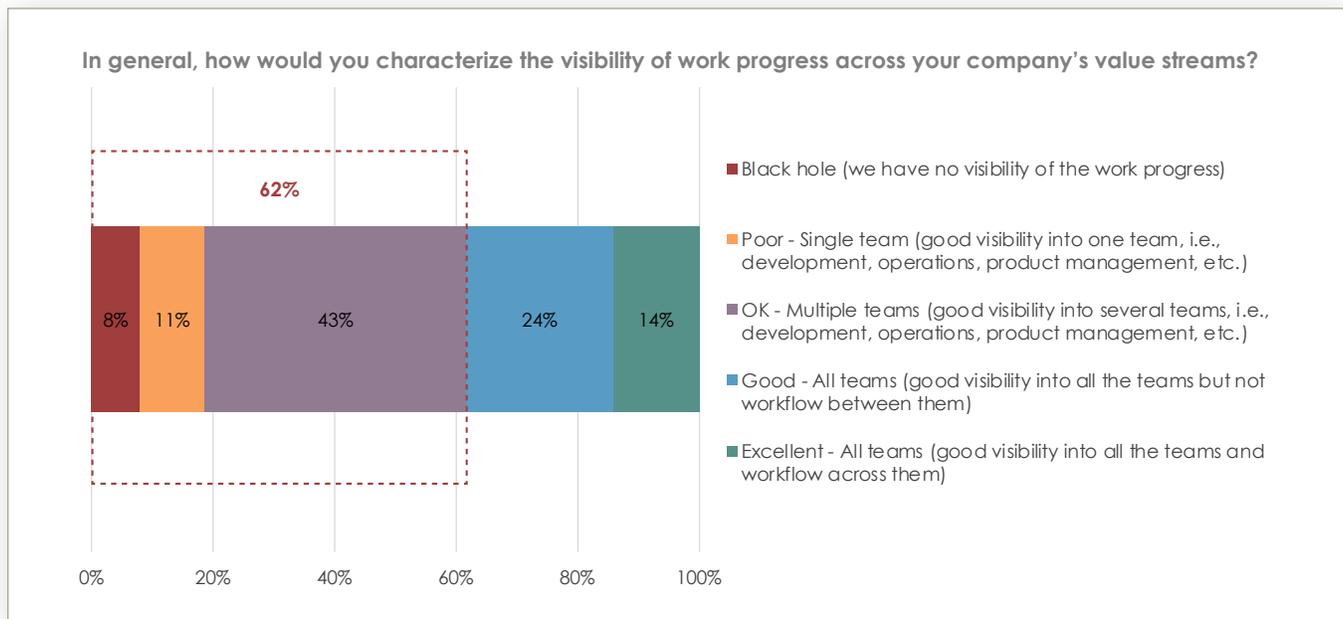
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## Companies Need Work Progress Visibility

While VSM is delivering widespread benefits, the research highlights that several areas still need improvement. One is overall visibility, which 62% say is mediocre or poor. While there is slight improvement from 2024, this finding aligns with some of the key challenges stated for 2025. One of top benefits of VSM is transparency, indicating that an increased focus on gathering and sharing critical data is needed.



“Getting people to buy into VSM can initially be hard. They see sharing data and information as more work initially and opportunity for criticism. But once they get on board and see how it improves value for others and customers, they get more supportive. But some teams take a lot longer than others.”

—VP IT, Higher Education



“Many teams work well together, but some, such as QA, compliance, and legal, don't show up with a 'how do we make this better' attitude. In fact, they don't really actively participate in VSM and we really have no visibility there. It goes in and sometime later, we know the process picks up with another team.”

—Executive (IT and Business Operations), Healthcare Provider

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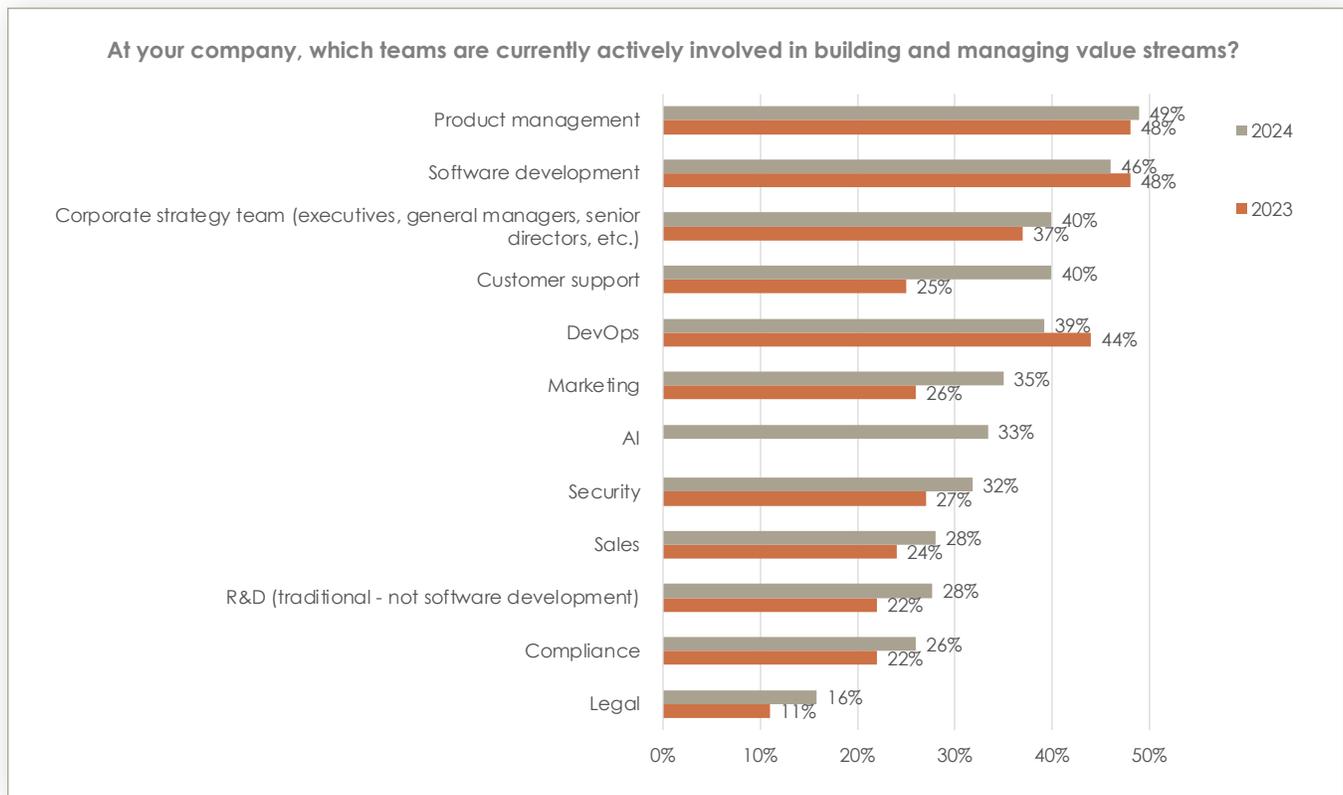
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## VSM Participation Grows with Customer Service Teams

A key tenet of VSM is team involvement, with the objective of getting every team along the value stream actively involved in maximizing the value delivered. Considering the chart below which compares team involvement in 2024 to 2023, a couple of significant changes appear. First, there is a substantial increase in customer service team participation, rising from 25% of companies in 2023 to 40% in 2024. This is a critical team, as most other teams at the top of the list are involved in the building and delivery of a product or service, but customer service teams are the ones who speak to customers daily and can capture how product value is being received. Measuring customer value is a critical metric. As the saying goes, “in order to improve you must first measure,” and customer service teams can measure some of the value received by customers and feed that information back into the value stream process for continuous improvement. The other significant change is that “AI teams” was added to the survey, which shows up mid pack. This represents a strong correlation and opportunity for AI to deliver improvements to the business and VSM initiatives.



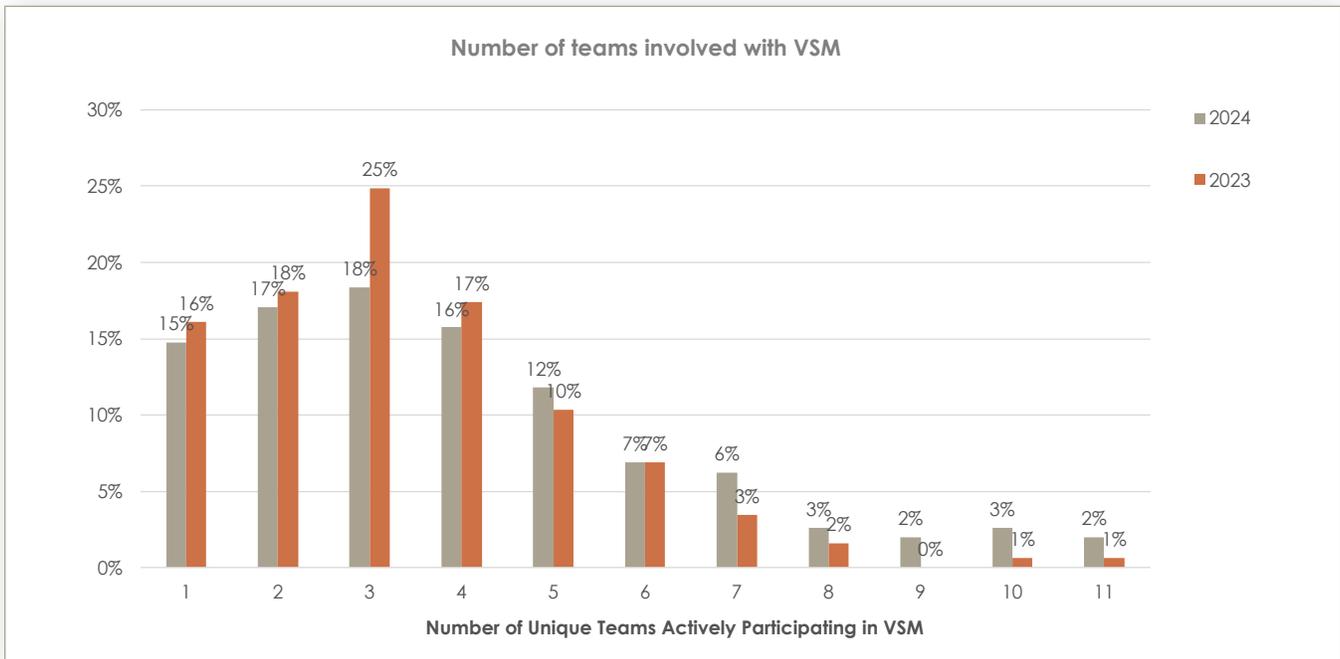
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While the 2023 bars in the chart above do reveal some expected increased team participation relative to 2023, overall participation remains too low. The highest percentage indicated is 49%, which means less than half of the companies surveyed have any one team involved in VSM. This can be seen more clearly in the chart below, which illustrates how many teams each company indicates are part of their VSM process. The good news is that, compared to 2023, more companies have selected five or more teams in 2024. However, in 2024 most companies represented two, three, or four teams were involved in their VSM initiative, which unfortunately remained the same as 2024. The data confirms a slow increase in the number of teams participating in VSM. This directly limits the ability of teams to gather key information and contributes to the visibility problems noted earlier.



“Customer service was added to VSM and now helps complete the feedback loop. However, distilling all the feedback and correlating it to specific products remains challenging. This is an area we think AI might be most useful for us.”

—CTO, Global Financial Institution



“Initial team participation was challenging, to get people thinking differently, thinking about value. But as business benefits are seen at the executive level, support is growing for adding more teams. However, including a new team takes time to understand their processes, and then how to optimize them in the context of the whole process.”

—VP, Retail Company

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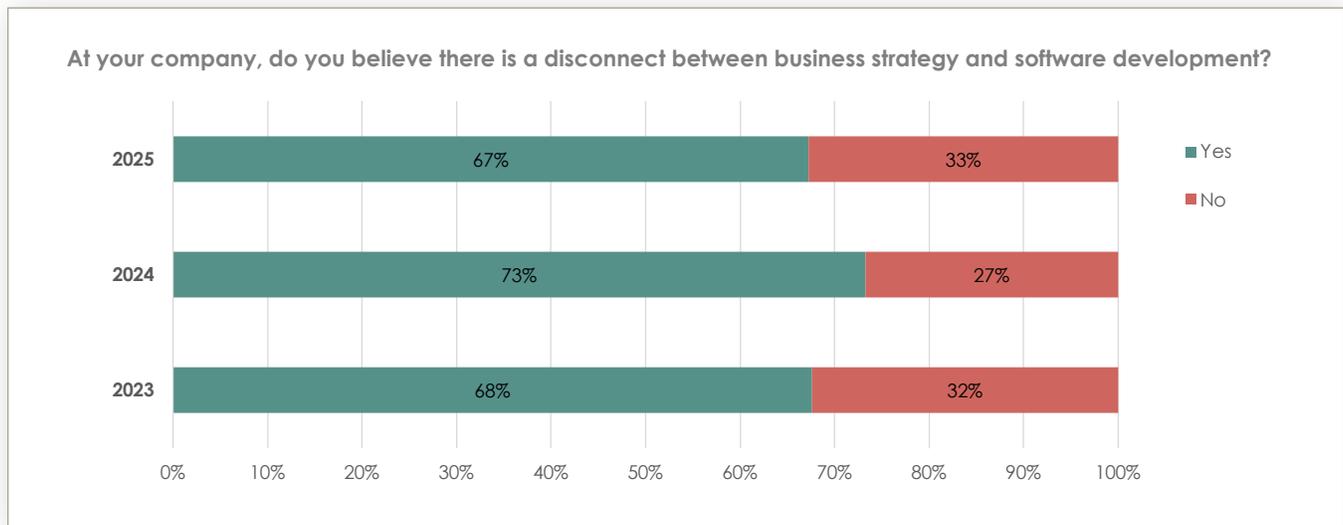
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## Lack of Team Participation Leads to Continued Disconnects and Frustrations

This lack of team involvement along the value stream generates visibility and data flow issues and is likely perpetuating the disconnect between business strategy and software development. The key observation from the chart below clearly illustrates the lack of material improvement over the last three years.



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With ValueOps, the seamless convergence of Clarity®, Rally®, ConnectALL™, and Insights in one platform empowers leaders at every level to plan, fund, manage, track, and optimize using a common data model and value orientation. With the widest range of features and the ultimate AI for value stream management, only ValueOps is built to align strategy, investments, people, and work across the entire enterprise.

For more information visit [www.broadcom.com/value](http://www.broadcom.com/value)

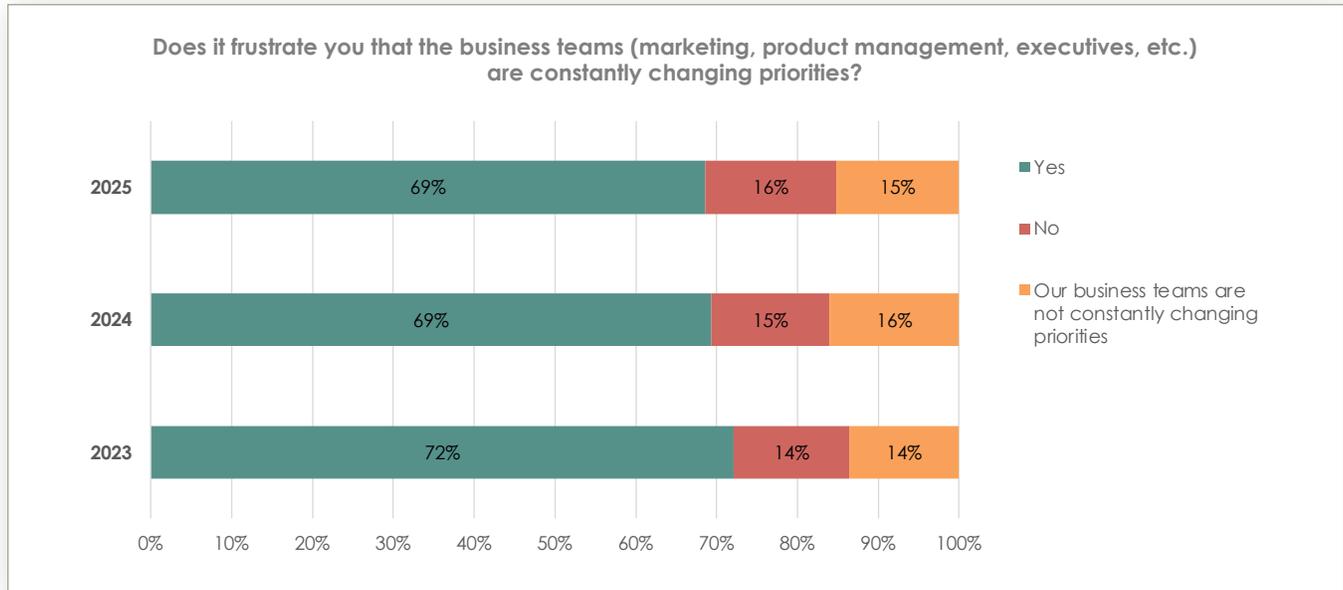
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Similarly, software development was asked about frustrations arising from having business teams constantly changing priorities. As above, this has not changed materially in three years. This indicates a lack of communication, involvement, visibility, and data sharing, which are reoccurring themes in this paper.



“Yes, team involvement and alignment continue to be slower than we would like. Some groups can be resistant, and their lack of participation actually generates problems they fail to see. It is fairly obvious in the work product of those who have embraced VSM and those who have not.”  
—VP, Retail Company



“The business doesn’t really understand the latest technology and the engineers and software developers get requirements from the business. So, you see the issue. The focus is to move both teams to a collaborative approach on what delivers the most value.”  
—CMO, Technology Company

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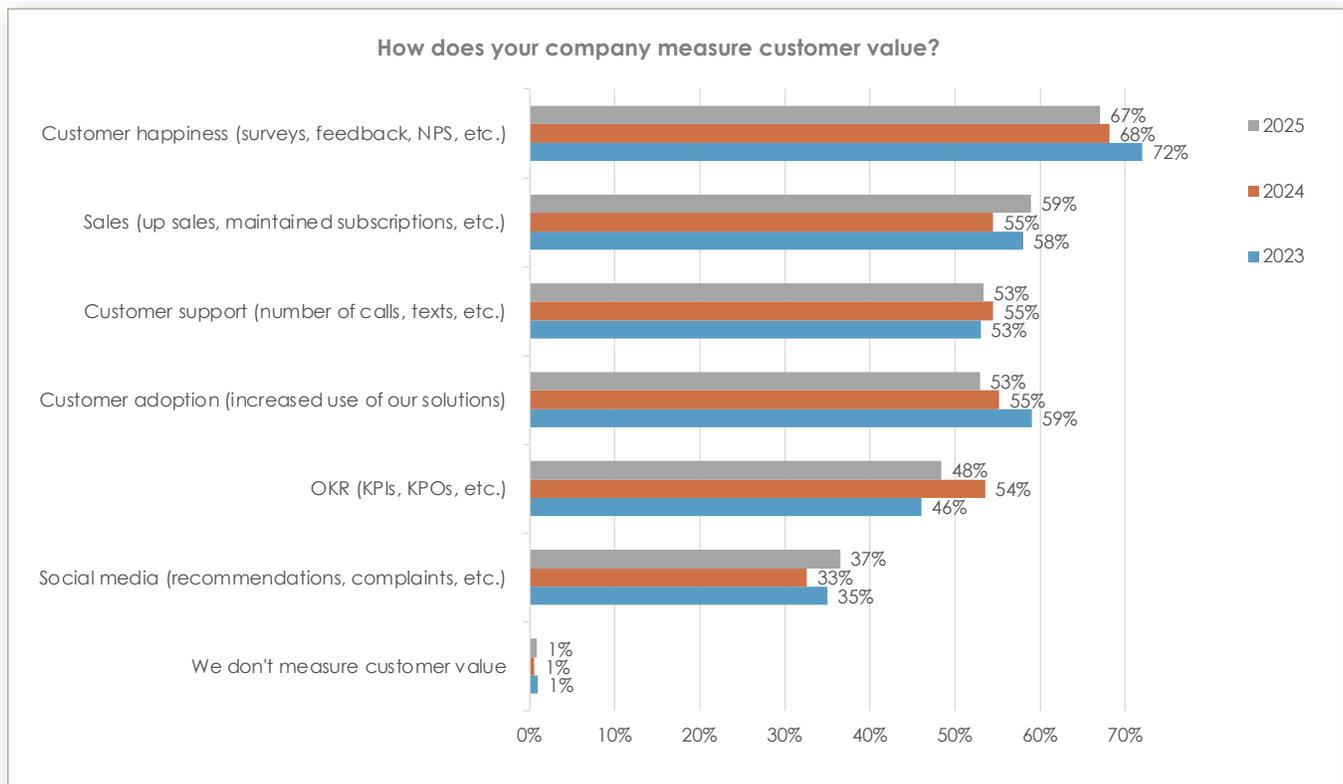
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## Companies Have a Limited View of Customer Value

The chart depicts the six key sources companies use to understand customer value. Unfortunately, the percentages remain relatively unchanged over the last three years. Earlier sections in this paper reported on how more customer support teams were becoming actively involved in VSM. It is anticipated that their interactions will contribute more significantly to how companies measure customer value. However, the current findings indicate that customer support remains the third most common source of input on customer value. In fact, all of the customer value sources have remained fairly consistent, with customer happiness surveys and feedback at the top (67%), followed by sales (59%) and customer support (53%).



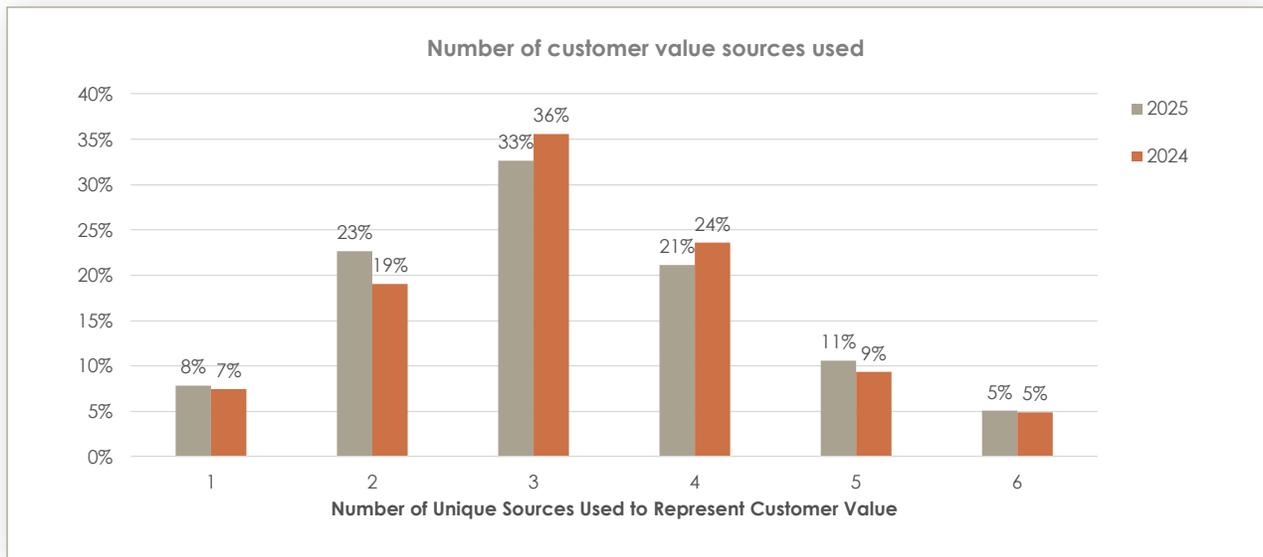
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A majority of companies are only using three of six sources available and, as outlined in the chart below, those figures changed little over the last two years. A comprehensive and accurate understanding of how the customer perceives value is probably the most important measurement to have for VSM. With these measurements, you can determine if changes in products and processes along the value stream are positive or negative in the eyes of the customer. In 2025, companies should strive to add a new customer value source with the long-term objective of utilizing all six sources.



“We have just started to realize that sales feedback and customer sat[isfaction] surveys don't paint the full customer picture. In order to really understand what makes our customers happy or dissatisfied, we need more information. We needed that to make our customers happier and then use it poach customers from our competitors.”

—VP, Retail Company



“There are so many sources of information about what the customer thinks. We know that some sources have an inherent and unintentional bias, such as sales and what helps them meet their quota, and customer service is mostly solving problems. You need a mix to balance it out, but all the data is in different formats, different systems, that is the issue.”

—CMO, Technology Company

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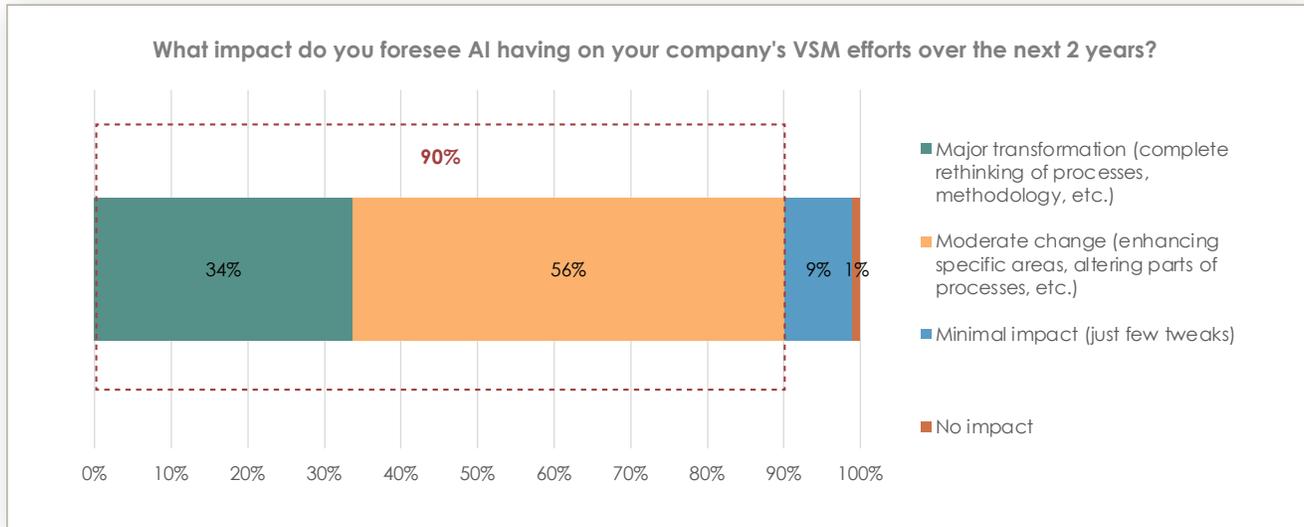
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## AI Already Driving VSM Benefits and Advancements

In this year's research, we sought to understand the level of opportunity AI presents for VSM specifically. 90% of participants indicated that AI offers significant changes and opportunities for advancements to VSM.



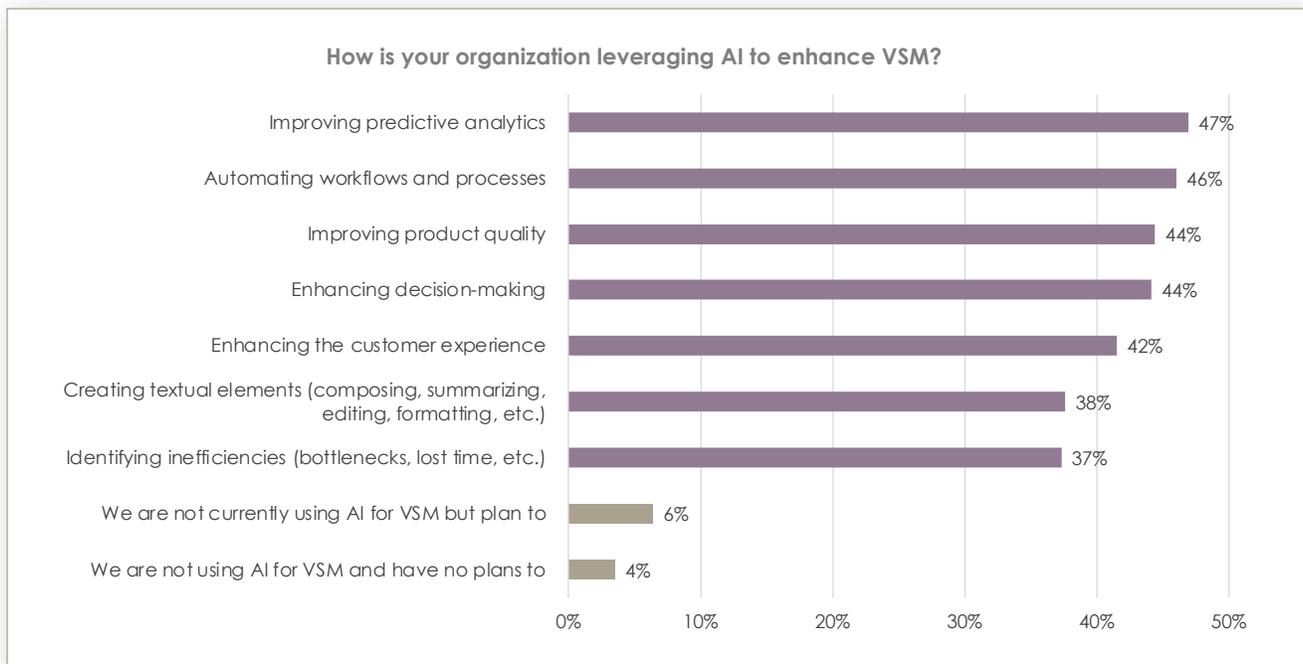
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While still very early for AI utilization with VSM, participants were explicitly asked what areas their companies were focused on in terms of using AI for VSM. Not surprisingly, the top-rated response was improving analytics (47%), which is a mainstay for modern AI. Next was automating workflows and processes (46%), which not only adds efficiencies to VSM but ties into the objectives of digital transformation. AI is expected to improve product quality and enhance decision-making at 44%. Just following at 42% AI helping to enhance the customer experience, a core aspect of VSM. One key takeaway from the chart below is drawn from the last two answers. Only 4% said they don't expect to use AI to enhance VSM, which means 96% do. In addition, 6% indicated they aren't currently using AI but plan to, considering those two answers equate to 10%, that results in 90% of companies that are already leveraging AI for VSM.



“VSM generates a ton of diverse information. We want AI to normalize it and feed it into decision making and back into value stream improvements.”

—CTO, Global Financial Institution



“We really want AI to be predictive, not just looking in the rear-view mirror. Is this data leading to a problem with the [product] line, will we have an on-time issue, will this change make customers happier, or less happy? That is what our business wants from AI.”

—CIO, Manufacturing

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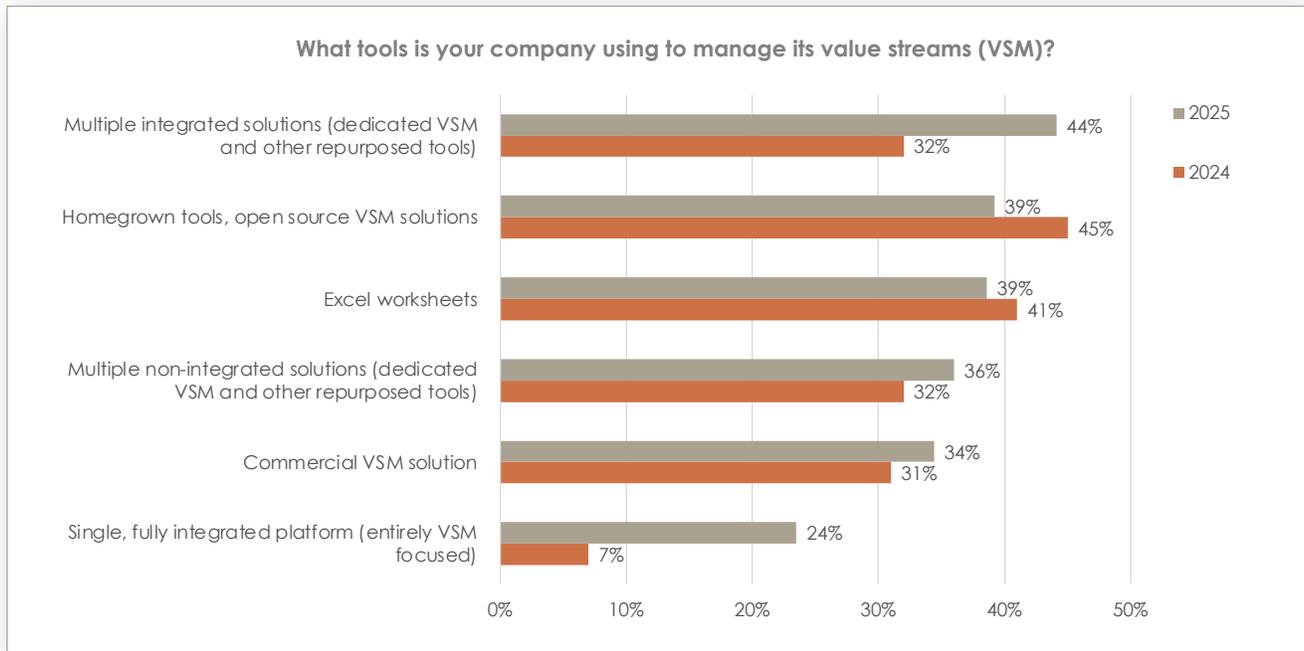
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## Commercial VSM Products Lead Solution Choices

Research into solution utilization revealed that significant changes have occurred over the year. At the top is now an integrated set of solutions incorporating dedicated VSM tools, which was indicated by 44% of participants. Last year, homegrown tools and Excel were the top two responses. Additionally, the chart below illustrates how the use of a fully integrated, commercial VSM-focused platform grew substantially, from 7% to 24%. Much of the preceding sections of this paper focus on objectives, benefits, processes, challenges, team involvement, data, and AI. But the key to realizing and capturing the value of VSM is gaining visibility and managing data at each step along the value stream. Dedicated platforms should make it easier to capture, share, and analyze data, and to leverage AI.



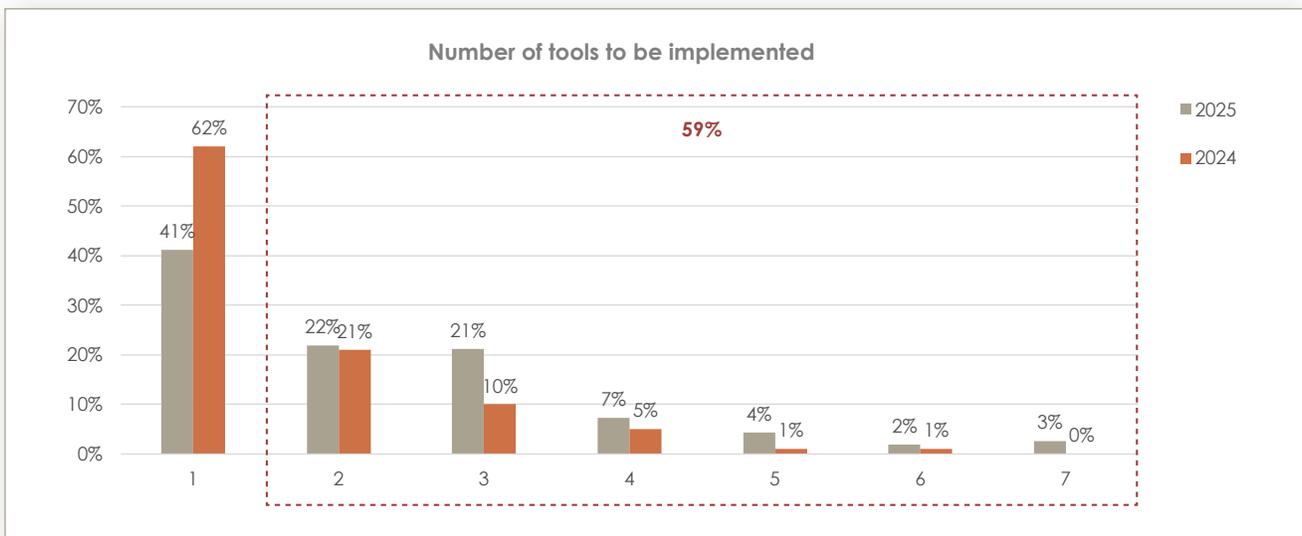
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The data suggests that teams have clearly come to the conclusion that standalone homebuilt tools, spreadsheets, and repurposed tools are insufficient and limiting the value VSM provides. Often these tools are operated by individual teams creating silos of data that aren't shared. The chart below indicates how the implementation of new tools increases in 2025. Note that only 41% are planning on deploying just a single tool, down from 62% last year, with 59% deploying multiple tools in 2025, which appears the companies are focusing on building out VSM platform approach where team or function centric solution can be plugged in and contribute to overall visibility and data collection.



“We started VSM and used Excel and a couple of existing tools, with developers homebrewing some additional functionality. We learned a few things: VSM is more complicated than we thought from a tools and integration viewpoint, and we didn't want to be a tool developer. We deployed a dedicated VSM solution last year and have two more planned this year to collect data from other departments. We are never going back.”  
—VP, Retail Company



“The data needs to be rolled up, available in a dashboard, and accessible for decision making and AI. We want to focus on increasing value, not on building out tools. VSM is fully greenlighted, and we are looking for enterprise-class solutions.”  
—CTO, Global Financial Institution

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## Conclusion

The research finds that companies and leaders are focused on the customer lifecycle of attracting and keeping customers by delivering more value than competitors. Customer value is the third part of the new business trifecta, along with growing revenue and reducing costs. The top business challenges cited for 2025 are adopting AI, managing data, contending with inefficient processes, and increasing customer value.

VSM adoption and maturity continue to grow, and the benefits leaders want are actually being realized: improved visibility, data collection, and management, which are fueling data-driven decision-making and increased customer value. VSM is also accelerating digital transformation, as VSM provides the context for what and how to digitize by focusing on what delivers business and customer value. This benefit has led every company pursuing digital transformation to also have a VSM initiative.

While VSM is progressing, there are a few areas that still need focus. The first is team participation. While improving, too many teams who function as part of the value stream are still not actively involved in VSM. This continues to lead to visibility problems, lack of alignment, and frustration. Second, the sources used to understand customer value have not changed in the last year, and companies are utilizing just half of the available sources. This means that customer value is not likely being accurately represented nor understood internally, and customer value should be what changes in products and processes are measured against.

AI adoption is seeing explosive growth. 90% of companies with VSM are already trying to use AI to improve their value streams for analytics, data-driven decisions, process optimization, product quality, and customer value. The types of VSM solutions being implemented are directly correlated with increasing VSM maturity and likely underpinning the delivery of more value to the business. Teams are migrating to an integrated solution that enables visibility, includes more teams, and provides greater data capture and sharing. The data VSM captures at each step along the value stream fuels AI, enabling insights for optimizing processes and products to increase customer value, while boosting efficiency and lowering costs.

To meet companies' 2025 objectives, executive leaders will need to inspire more teams to participate in VSM. In addition, they'll need to harness an enterprise-class VSM platform so they can capture and share data with each team and capitalize on the potential of AI.

## Survey Methodology

Executives as well as IT and business leaders at enterprise companies representing all industries were invited to participate in a survey on their company's VSM and digital transformation initiatives. The survey covered objectives, challenges, and solutions. Responses for selected questions were compared to results from previous years' surveys to create year-over-year trends. Six executives from the survey were invited to participate in in-depth interviews to discuss their responses and provide deeper insights into the findings.

# 2025 VALUE STREAM MANAGEMENT TRENDS

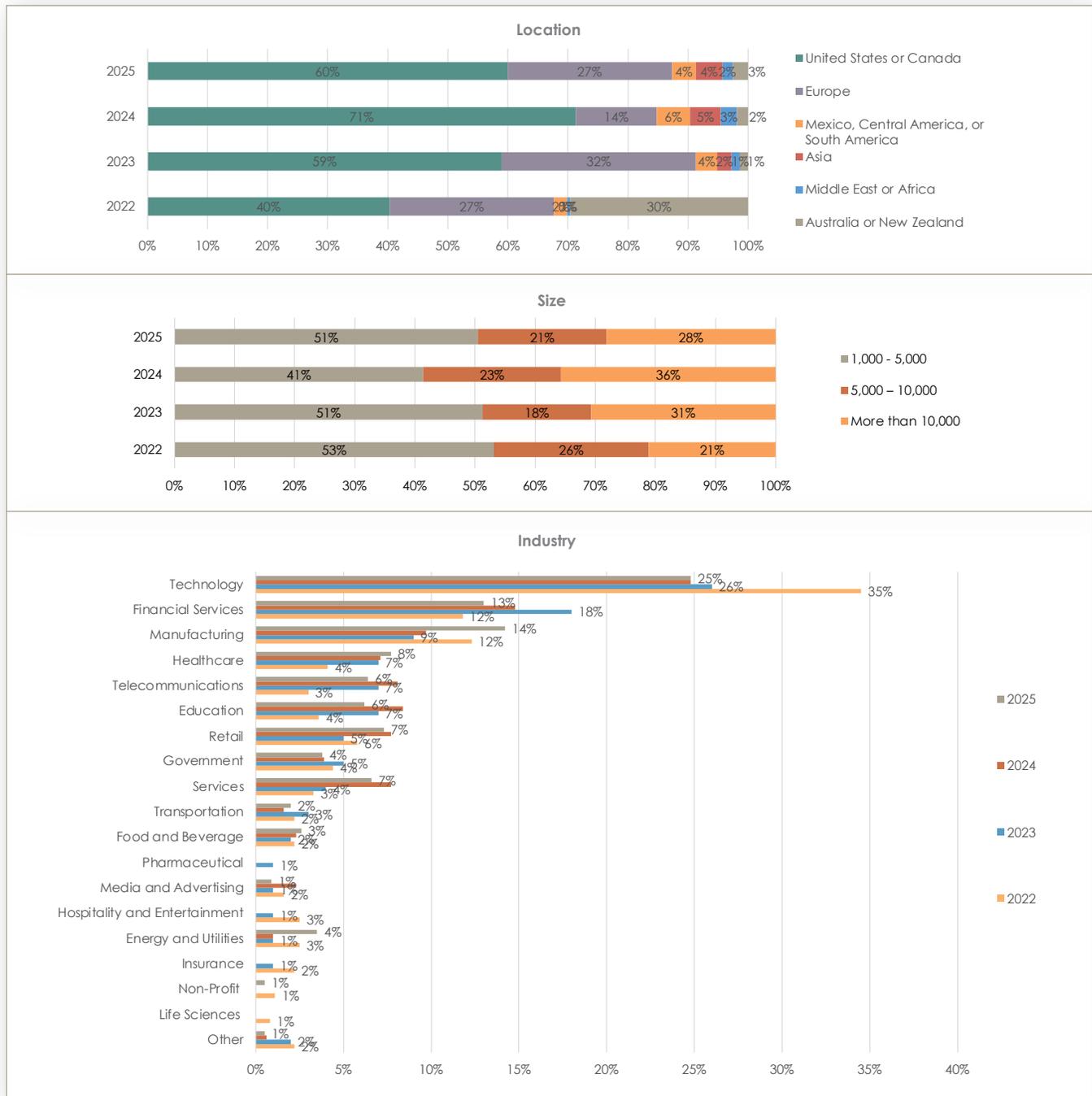
A Global Survey of Executives and IT Leaders



Dimensional Research | January 2025

A total of **548 qualified participants** completed the 2025 survey, bringing the total number of participants in our four-year study to more than 2,700. All participants had direct responsibilities for digital transformation at their company. Participants were from five continents, providing a global viewpoint. The survey was administered electronically, and survey respondents and interviewees were offered a token compensation for their participation.

Participant quotes were lightly edited for grammar, readability, and context.



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## About Dimensional Research

Dimensional Research provides practical marketing research to help technology companies make their customers more successful. Our researchers are experts in the people, processes, and technology of corporate IT and understand how IT organizations operate. We partner with our clients to deliver actionable information that reduces risks, increases customer satisfaction, and grows the business.

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