



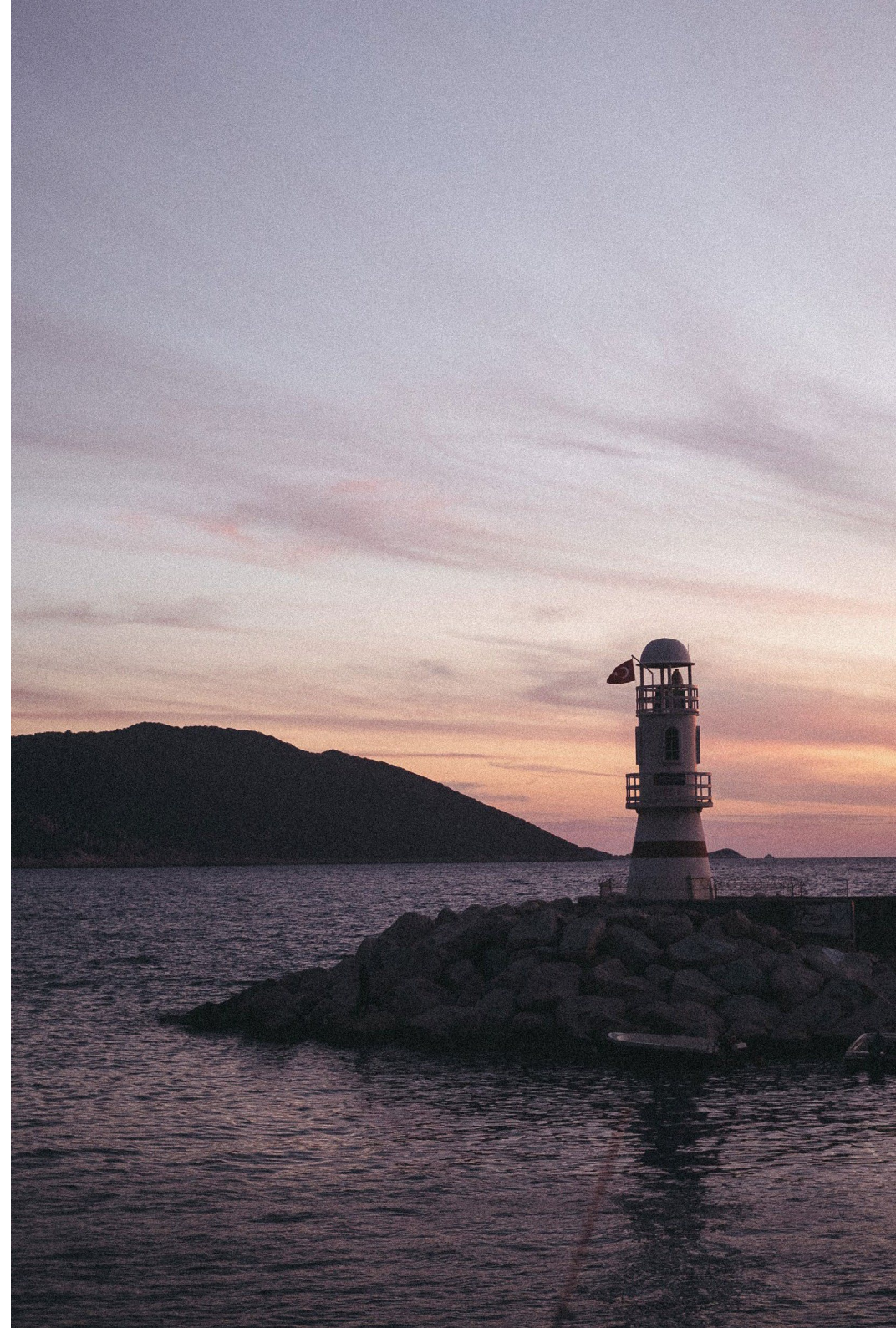
Product Development Field Guide



SAFEGUARD
GLOBAL

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Section 1

What is a Field Guide?

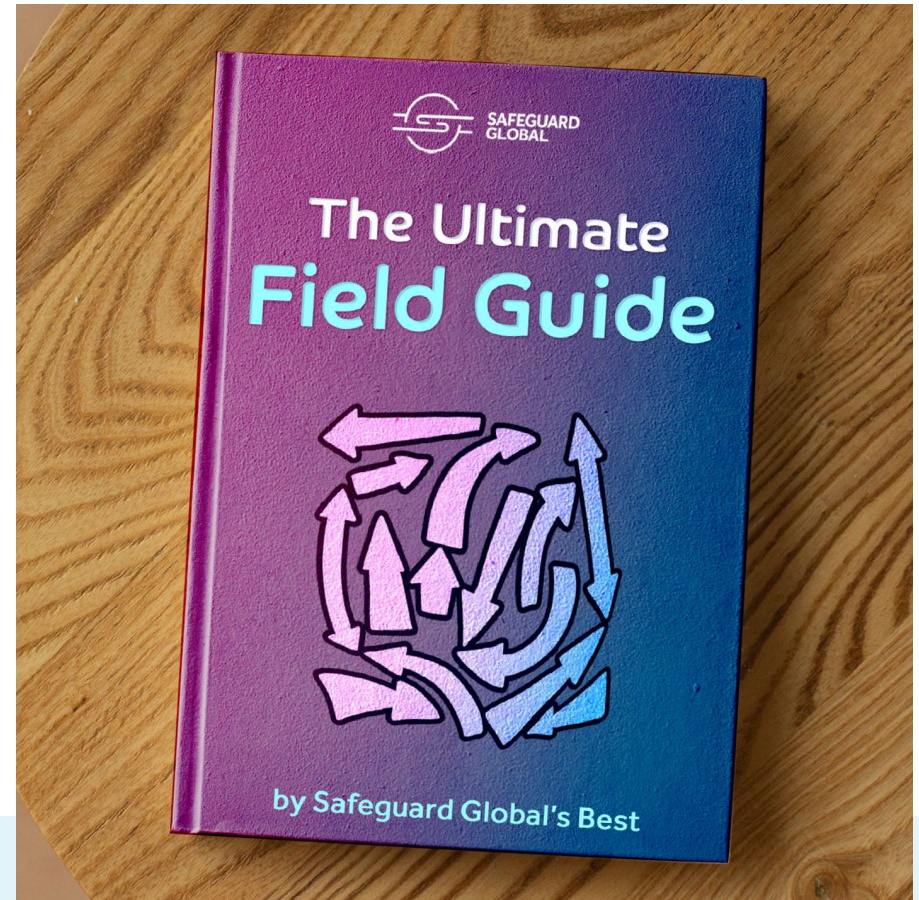


What is a Field Guide?

A field guide is a condensed book to assist the user in completing a particular task in the field.

We created this guide to facilitate the onboarding of Safeguard Global's new employees, introducing them to working within Product Development.

Additionally, this document will serve as a reference point for Safeguard Global's established employees as we continuously improve, mature and transform as a technology company.



This is a living document, evolving along with our journey to align our teams on the company's latest processes and goals.

Section 2

About Safeguard Global



About Safeguard Global

1. We are Guardians

Our vision is to forever transform the way people work around the world by equipping organizations with the technology, local expertise and service to adapt to an ever-shifting global market.

2. Our Solutions

Safeguard Global helps organizations hire, onboard, manage and pay employees in over 165 countries quickly, accurately and compliantly.

Our [Global Payroll solution](#) gives multinationals comprehensive insights into workforce costs to help make data-driven strategic decisions.



And our industry-leading employer of record service, [Global Employment Outsourcing](#), enables expansion into international markets in as little as two weeks.

Facts and numbers never lie. Over 1,300 organizations across the world, large and small, trust our global knowledge and expertise to enable their business success.

3. Our Values

Our values underline how we interact with our fellow Guardians, clients, and the market. They shape our thinking and decision-making.



Passion & Talent
Disrupt & Empower
Fun
Accountability
Caring
Integrity

4. What Makes Us Unique

We dive into complexity and reduce it to simplicity and convenience for our clients. Our all-in-one platform for workforce enablement is flexible and universally applicable in ways that companies can engage and pay employees (or contractors) anywhere. Coupled with our deep expertise in paying people around the world, it makes us unique in our markets.

5. Our Approach

Business outcomes drive us, products organize us, and technology enables us. We champion data-based decisions and bring an agile mindset to solving problems. We care about shared vision, buy-in, measurable outcomes, working iteratively, and continually releasing working and tested software.

Section 3

Our Approach





High performance has been tied to successfully entering a state of flow

as individuals, as teams, and as an organization

Our Approach

1. Business-Driven, Product-Led, Technology-Enabled

Our approach centers on business outcomes, which drive our decisions and promote agility with alignment. We are product-led, focusing on building long-lived products over time-bound projects.

We are also technology-enabled. We leverage advanced technologies and high-performance engineering techniques to build flexibility, scalability, and innovation into our products to stay ahead of the competition.



2. The Team is the Single Unit of Innovation

Every product has a team with cross-functional skills necessary to accomplish established objectives: minimizing handoffs, bottlenecks, and silos. A Product and an Engineering Lead manage these teams through a “2-in-a-box” model. These leaders are called *Single-Threaded Leaders*. They work together, jointly owning the outcomes of the final product.



3. Product Over Project

Software projects are a popular way of funding and organizing software development. They organize work into temporary, build-only teams and are funded with specific benefits projected in a business case.

The product approach instead uses durable, ideate-build-run teams working on a persistent business issue. The product approach allows teams to reorient quickly, reduces their end-to-end cycle time, and allows validation of actual benefits by using short-cycle iterations while maintaining the architectural integrity of their software to preserve their long-term effectiveness.

Benefits of the Product Approach:

- Ability to reorient quickly
- Reduced end-to-end cycle
- Ability to truly iterate
- Knowledge retention
- Architectural integrity
- Team motivation and dynamics
- Economies of flow and iteration

We choose Product over Project approach and invest, organize and plan deliberately to achieve this outcome.

4. What is a Single-Threaded Leader

A Single-Threaded Leader is 100% dedicated and accountable for a domain. This person is empowered to turn strategy into tangible results and is responsible for the outcome.

Single-Threader Leaders provide guidance, direction, and leadership to their teams, within or outside the direct management line.

5. What is a Product Line

A Product Line is a logical grouping of products that form a complete experience or strategy. Like Product Teams, Product Lines are led through a "2-in-a-box" joining of product and engineering.

Product Line leaders are responsible for setting context, strategy, and guardrails. The main goal is to enable the product teams to work independently towards their objectives while still aligned with the overall strategy and vision.



6. Encapsulation Over Orchestration

Teams perform best when focused and working together. However, product development requires different skills to design, build, and test products simultaneously.

Our approach encapsulates these skills in the cross-functional product team.

We maximally break cross-team dependencies and orchestrate where this is not possible. As a result, orchestrated communications are less frequent, sometimes asynchronous, and more predictable. Efficient, predictable orchestration is a key responsibility of the Product Line and Guild Leaders.



7. What is a Platform

A platform is a foundation of Self-Service APIs, tools, services, and knowledge, arranged as compelling internal products. These products enable Product Teams to work faster and safer. In addition, the platform provides generalized services that teams need to coordinate, scale, and observe the system as a whole.

8. What is a Guild

A guild (aka Community of Practice) is a community of people with related interests, serving as the perfect medium for sharing knowledge, tools, code, and practices.

Guilds are an important aspect of our Product Development approach for sustainable growth, innovation, and scale.

Guild OKRs relate to the interests of the community and often involve education, skills development, pattern development, and cross-cutting concerns.

Guilds include:

- Architecture
- Agility
- Quality

Guilds have dedicated Guild Leaders. Like Single Threaded Leaders they have the responsibility of establishing and achieving OKRs.



9. Who is Involved From Business

The agile way of doing business affects everyone in the organization. So, in one sense, everyone is involved on some level. It is critical that we have support from key stakeholders and team members for our approach to be successful.

Agile emphasizes Outcomes over Outputs.

Negatives of focusing on the outputs
(aka The Project Focus Mindset):

- 👎 Handoffs
- 👎 Marginalized Team Ownership
- 👎 Less Innovation
- 👎 Reduced Time to Market
- 👎 Inferior Quality
- 👎 Demonstrably Worse Outcomes

In contrast, product development projects outcomes congruently with the business objectives.

Single Threaded Leaders identify stakeholders, including senior people involved in funding. The latter also identify the product goals and outcomes and support the product development process.

These activities are clearly defined and prioritize orchestration techniques.

Common Orchestration Techniques:

- Cadences
- Recorded Demos
- Training Materials
- Living Roadmaps

10. How Do We Periodically Assess Progress and Make Sure Everyone Stays Informed

10.1 Technology Showcase (Sprint Review Meetings)

These meetings occur every 1-3 weeks. The Product Team summarizes the work in detail, including OKRs progress, recent and upcoming releases, risks and obstacles, and learnings.

The Sprint Review sessions are recorded and shared with the stakeholders to increase engagement without additional meetings.

10.2 Product Development Update Meetings

Occurring every month between the Product Line Leads and Stakeholders (including the SLT), these meetings involve strategy review, business KPIs analysis, adoption metrics, and product line OKRs.

A hallmark of these meetings is the joint effort between the Senior and Product Line Leaders on a small number of strategic items.

10.3 Objectives and Key Results (OKRs)

This collaborative goal-setting technique is used to set challenging, ambitious goals with measurable results. *OKRs* are how we track progress and create alignment.

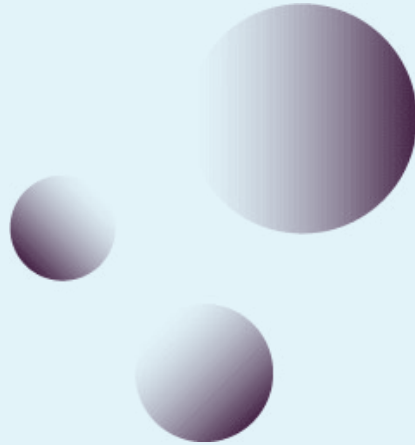
10.4 Statement of Direction

It describes the long-term mission and path of a product or product line.

The key outcome of these meetings is enablement.

10.5 Living Roadmap

The Living Roadmap is a flexible planning technique to support strategic and long-range planning. The roadmap constantly changes, shaped by new learnings, like better and faster ways of achieving the same outcome, identifying risks and obstacles (or dependencies), and recognizing new business opportunities.



10.6 Release Plan

The Release Plan helps inform the stakeholders from operations, sales, marketing and clients about major releases to coordinate activities outside the Product Team.

11. How Do We Know Where We Are Going

An essential principle of the Agile approach is establishing a solid understanding of the business goals and objectives, the product strategies for achieving them, and the technology strategies for enabling them.



At the beginning of every quarter, the Product Line Leaders work with Business Leaders to jointly define the OKRs for the quarter.

12. Defining Metrics & Tools

Metrics are the lifeblood of any agile organization. They express outcomes that replace outputs and detailed plans.

Defining metrics is a necessarily collaborative process, allowing teams to align on what progress looks like and stay focused as a group. Review of these OKRs occurs on a regular cadence.

13. How Do We Approach Change Management

Intentionally championing and managing change is the key to success. Therefore, we automate where we find it possible. That includes code, quality, infrastructure, compliance and security. And for the items we cannot automate, we leverage a range of activities, including virtual-live training, newsletters, and recorded demos.

Product Leads facilitate these efforts and are available to support and guide the business when things get complicated.

14. What Does a Communications Plan Look Like

Keeping stakeholders in the loop about our goals and objectives and planning for achieving the desired outcomes is critical for success.

Communication Plans can involve publishing marketing materials, facilitating workshops and lunching learning sessions, pitching at management meetings, conducting remote webinars and crafting other general communications that helps everyone understand what is going on and how it impacts them personally.

50:50



Who Wants to Be a Guardian?

- Are we Scrum?
- Do we value quality?
- Do we value speed to market?
- Do we predict and plan?
- Are we Agile?
- Do we have ceremony?
- Is stakeholder readiness critical?
- Are we Kanban?
- Do we collaborate in real time via workshops?
- Do we define requirements?

Yes

Yes, of Course!

Positive

Definitely, Yes!

In a Nutshell, Teams are:

- Autonomous
- Driven by Business Metrics
- Accountable
- Results-oriented

- Team Leads define the best structure, process, and methodology for their product based on various factors.
- What works for one team may not work for another.
- What works for idea A may not work for idea B.
- What works in January may not work in May.
- Teams are empowered to define the way of working for the circumstances of their product at that time.



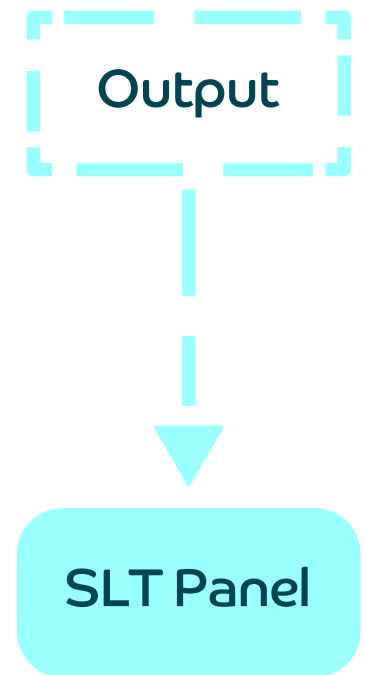
Section 4

Innovation



Innovation Day (Hackathon)

- It's fun, different, and it reflects our transformation as an organization
- Anyone can solicit ideas (App Support / Operations / Implementation, etc.)
- Dynamic teams (expand beyond Product Development)
- Condensed, dedicated focus time for Product Development teams and guilds
- Once per quarter / more than a day – less than a week
- Accelerate and problem-solve for the roadmap and other top priorities
- Important or non-urgent priorities (hardest to get to)
- Creative thinking / focused on delivering for the business



Welcome to the Future of Work

