

AI-accelerated shipping vs. rising CAC, plus sharper PM/engineering boundaries

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AI-accelerated shipping vs. rising CAC, plus sharper PM/engineering boundaries

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This edition covers three pressure points shaping PM work right now: shipping faster with AI while CAC/marketing noise worsens, rebuilding healthier boundaries between product and engineering, and adapting your approach with stronger commercial and stakeholder empathy. It also includes practical playbooks for leadership misalignment, bug investigations, and multi-team execution risk—plus tools for Claude Code workflows and automated OST generation.

Big Ideas

1) AI makes it easier to ship—while acquisition can get harder

Andrew Chen frames a growing tension: “**your product gets better every week, but your CAC gets worse every month.**”¹ The question becomes whether your product can get good enough to drive **organic growth** before marketing channels saturate at scale².

AI may intensify both sides of the equation: teams can write, code, and ship faster, while the marketing environment gets noisier as AI-led products launch and AI-generated content fills feeds³⁴.

Why it matters: Faster delivery doesn’t automatically translate into efficient growth if the environment for distribution is degrading over time⁵⁶.

¹ post by @andrewchen

² post by @andrewchen

³ post by @andrewchen

⁴ post by @andrewchen

⁵ post by @andrewchen

⁶ post by @andrewchen

How to apply: Use this as a standing planning constraint: pressure-test whether your near-term roadmap is aimed at (a) reaching “good enough” for organic pull ⁷ and (b) doing it before channel noise/costs move further against you ⁸⁹.

2) Re-draw PM/Engineering boundaries: product owns the *what*; engineering owns the *how*

Teresa Torres and Petra Wille argue for a crisp division of responsibility:

“The product trio owns the what... And engineers own the how.” ¹⁰

They describe common boundary blurs—PMs prioritizing bugs, communicating bug status, deciding tech debt payoff, and even getting into architecture/system design ¹¹. One root cause they point to is an **IT/order-taker mindset** where engineers “take orders from the business” ¹²¹³. Another is the “CEO of the product” metaphor, which can push responsibility for engineering quality onto PMs ¹⁴¹⁵.

Why it matters: They link blurred boundaries to PM burnout, poor engineering quality, and toxic culture ¹⁶.

How to apply: - If quality is an issue, **surface it to engineering leadership** rather than trying to manage individual engineers yourself ¹⁷¹⁸. - Reduce “PM-as-middleman” by facilitating a direct channel for bug status visibility (Slack, dashboard, or a bug tracking system) ¹⁹.

⁷ post by @andrewchen

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¹⁰Boundaries Between Product & Engineering - All Things Product with Teresa & Petra

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¹⁹Boundaries Between Product & Engineering - All Things Product with Teresa & Petra



Boundaries Between Product & Engineering - All Things Product with Teresa & Petra (2:19)

3) The PM “meta-skill”: adapt to business context (and build commercial credibility)

In a Mind the Product conversation, Dave Wascha emphasizes two basics that often get missed:

- **Empathy for internal stakeholders** (e.g., sales, founders/executives) and adapting your approach to their context ²⁰. He shares an example of a junior PM insisting on 6–8 weeks of discovery while a founder faced urgent customer commitments tied to sales the company needed ²¹.
- **Commercial context**: understanding how the company makes money and how to read a balance sheet—described as “table stakes” and a potential “cheat code” ²²²³. He recounts realizing that at Zoopla, only ~5–10

²⁰Why so many product managers feel frustrated right now | Dave Wascha (Zoopla, AlbionVC)

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²³Why so many product managers feel frustrated right now | Dave Wascha (Zoopla, AlbionVC)

PMs (out of ~25–30) understood how the company makes money, which undermined product credibility with commercial teams ²⁴.

Why it matters: Wascha also notes a “huge explosion” in the number of people with the PM title, creating noise for employers trying to find candidates who’ve actually done the job ²⁵.

How to apply: Treat “empathy + economics” as a paired capability: sense what the business needs *now* and show your work in those terms (runway, commitments, churn/sales urgency) ^{26,27}.

Tactical Playbook

1) When leadership expectations are unrealistic: diagnose the disagreement, then drive the narrative forward

A Reddit thread describes a PM in a niche 0-to-1 beta who set modest revenue expectations based on market pricing, while leadership expected a “huge money maker” and dismissed requests for a pricing study/market sizing revisit ²⁸.

Step-by-step: 1. **Clarify where you disagree:** is it the sizing/pricing *method*, the *assumptions*, or an implicit desire to “stretch” delivery regardless of evidence? ²⁹ 2. **Write it down early and continuously:** “document everything, save emails, cc people” to prove you raised concerns ³⁰. 3. **Avoid “I told you so” energy:** one commenter warns that making leadership feel stupid is counterproductive ³¹. 4. **Bring a one-pager that converts beta reality into options:** summarize what the beta is showing, where assumptions were off, and **2–3 adjustment options + your recommendation** ³². 5. **Start with your manager relationship:** how you play it depends heavily on your relationship with your direct manager ³³.

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²⁸_r/ProductManagement post by u/kt7380

²⁹_r/ProductManagement comment by u/Competitive-Base-721

³⁰_r/ProductManagement comment by u/Latter-Risk-7215

³¹_r/ProductManagement comment by u/UpwardPM

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³³_r/ProductManagement comment by u/UpwardPM

2) Critical bug investigations: choose your role by scope—and avoid becoming the status conduit

A separate Reddit discussion suggests your role depends on the bug ³⁴. Sometimes you “just want to know when it’s fixed” ³⁵; other times the issue spans code *and* business processes, requiring a PM to steer interim workarounds with the business while engineering fixes the technical issue ³⁶.

Step-by-step: 1. **Classify the incident:** pure code fix vs. cross-functional breakdown (code + process) ³⁷³⁸. 2. **If it’s mostly technical, delegate:** get a summary to update customers/stakeholders—“too many cooks” can slow things down ³⁹. 3. **If it crosses into business operations, lead the coordination:** focus on containment and interim paths until the fix lands ⁴⁰. 4. **Systematize visibility:** set up a place where the business can ask engineers for bug status (Slack channel, dashboard, or tracking system) so the PM isn’t the middleman ⁴¹.

3) Planning in big orgs: treat multi-team work as a first-order risk

Andrew Chen summarizes a heuristic from Uber: - New project within your own team: **easy** ⁴² - Between two teams: **possible but hard** ⁴³ - Three or more teams: **impossible** ⁴⁴

Step-by-step: 1. **Count the teams required** before committing to scope (not after) ⁴⁵⁴⁶⁴⁷. 2. **If it’s trending toward 3+ teams, treat the plan as non-viable** unless scope or ownership changes ⁴⁸. 3. **If it’s two teams, assume friction is real** and plan communications accordingly ⁴⁹.

³⁴_r/ProductManagement comment by u/NoahtheRed

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Case Studies & Lessons

1) “Board wants it” vs. market reality: protect the team *and* redirect the conversation

In the misalignment thread, the PM explains they were told to build the product because “the board wants it,” and found leadership’s price expectations were based on competitors where the capability was often an add-on—using an analogy like pricing the whole Microsoft suite as if it were priced on Outlook’s value alone ⁵⁰. When told pricing wasn’t their concern, they documented a compare/contrast feature analysis against competitors to show the discrepancy ⁵¹.

Takeaways: - If leadership blocks pricing/sizing work, you can still **document competitive deltas** to create an evidence trail ⁵². - When delivery expectations are implicit (e.g., feature parity on an impossible timeline), documentation becomes a form of team protection ⁵³.

2) What “good boundaries” look like with strong engineers

Teresa/Petra describe that with skilled engineers, it’s “impossible to work” in a way where PMs split work into components or dictate how it should be built—strong engineers will push back, own architecture and sprint planning, and handle refactoring/tech legacy management within engineering ⁵⁴.

Takeaway: If your team expects PMs to decide component order and architecture, it may be signaling a leadership/skills gap rather than a PM responsibility gap ⁵⁵⁵⁶.

3) Credibility gap: PM teams that don’t understand how the company makes money

Wascha recounts that at Zoopla, many PMs didn’t understand how the company makes money, which undermined credibility with commercial counterparts ⁵⁷.

Takeaway: Commercial context isn’t “nice to have”; it directly affects whether

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non-product stakeholders trust product decision-making ⁵⁸.

Career Corner

1) In a noisy PM market, make it easy for employers to see signal

Wascha suggests there may be an oversupply dynamic—many people hold the PM title without the “classic experience” of product management, creating noise and extra filtering work for employers ⁵⁹.

How to apply: - Build your narrative around **commercial context and impact orientation** (e.g., showing you understand business drivers) ⁶⁰⁶¹. - If you're job hunting: **keep the CV to one page if you've worked <10 years** ⁶².

Tools & Resources

1) Claude Code workflows for PM work (plus a free live session)

Sachin Rekhi says he has migrated nearly all his product work to **Claude Code**, claiming at least another **3x** productivity gain beyond prior AI's “10x” improvement ⁶³. He describes custom skills for end-to-end customer interview synthesis, autonomous NPS programs, exploratory data analysis without writing SQL, and critiquing product strategy drafts ⁶⁴.

He also lists agentic capabilities like autonomous workflows without needed input, generating local markdown artifacts, custom tool calls (e.g., transcribing interview recordings), and writing code on his behalf ⁶⁵⁶⁶⁶⁷⁶⁸.

Resource: Free event “Claude Code for Product Managers” (March 4, 10am PT) with workflow demos and building a custom skill ⁶⁹. Registration link:

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⁶⁸ post by @sachinrekhi

⁶⁹ post by @sachinrekhi

<https://luma.com/b2zbii7n> ⁷⁰

2) Opportunity Solution Trees (OST): generation is getting automated; visualization is the next bottleneck

A post in r/prodmgmt describes a tool that generates OSTs from multiple customer interviews, synthesizes the data, and outputs a full OST analysis in text (or potentially JSON) ⁷¹. The open question: how PMs prefer to **write up or visualize** OSTs (e.g., Jira vs. a visual artifact) ⁷².

Why it matters: If OST creation becomes easier, the differentiator shifts to how clearly you communicate the tree to stakeholders and connect it to execution artifacts ⁷³.

3) Two videos worth saving

- **Boundaries Between Product & Engineering — All Things Product with Teresa & Petra** (YouTube): https://www.youtube.com/watch?v=Nr1r_FBmQe8 ⁷⁴
 - **Why so many product managers feel frustrated right now | Dave Wascha** (YouTube): <https://www.youtube.com/watch?v=y3D0SaeCMe8> ⁷⁵
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