

Building gets cheaper, but PMs still own the business case

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Cheap AI building is pushing PMs toward domain depth, financial literacy, and evals. Also covered: Lenny Rachitsky's "row, then steer" summary, a new read on AI PM job listings, and Sachin Rekhi's updated workflow stack.

Cheap building moves the hard part

A former PM working in e-commerce ops says he built an analytics system "in a couple of days." It replaced a Fabric-to-Power BI setup that cost a lot in freelancer fees and kept breaking. He chose to build add-ons for the order-management system instead of replacing it [1]. His case for PMs is that AI gets "80-90%" of system requirements, "and sometimes that remaining 10% is huge." He adds that nobody is posting jobs for this work yet, so you have to create the market yourself [1]. Replies pushed back on the cost. Building is cheaper, but "the cost of alignment. Stakeholder management. Making product and technical decisions" is not [2]. Teams also bought SaaS to hand off maintenance and to get deep domain knowledge that is hard to find [3]. Hiten Shah takes the macro view. He's "increasingly convinced" that most consumer and enterprise software "will be completely rewritten" [4].

Domain depth and finances as PM leverage

Productify argues that every industry keeps its own scoreboard: margins, unit economics, regulation, market share. A product can launch beautifully and still be "a success only on paper" [5]. Knowing which problems are already solved commodities and which are still open "is itself domain knowledge," and that knowledge saves months [5]. The author's advice on AI: it makes "breadth cheap," so use the time it saves to go deeper on fewer problems [5].

On *One Knight in Product*, Simonetta Batteiger makes the financial version of this argument. Token-heavy AI features add “a new margin risk.” Costs should be tracked by user, workflow and interaction pattern, and doing that “starts in the code” [6]. Her rule of thumb is that a team should return at least five to seven times what it costs. She also notes that most PMs “don’t know what their team costs” [6]. Her fix is to ask finance which revenue levers matter. She says no one in her course has been refused those numbers [6]. She also says AI’s non-determinism means PMs need rollback options, kill switches and evals in case a new model drifts [6].

A r/ProductManagement thread on “PM career as pursuit of power” debated where authority comes from. One reply: “There has to be one person with final decision power, and that is typically the PM” [7]. Another said a good PM shares many decisions, guided by the team’s expertise and the problems customers will pay to solve [8].

Evals: the demo isn’t the evidence

Aakash Gupta shows why a clean demo proves little. An agent that fails 3% of the time still passes all 50 tickets in about 22% of runs [9]. His “real” rollout sequence: an LLM judge says “95% good and catches zero failures.” Then comes a 5% ship where “evals go up, usage stays flat.” After that, a power user eats the margin, and a new model “calls tools differently” [10]. His conclusion is that what decides success sits around the model: context, tools, permissions and checks [10].

AI PM listings: a few years of AI proof on top of normal tenure

Gupta also hand-classified 113 AI PM listings from LinkedIn. 69% explicitly wanted AI or ML experience, or 55% on a softer reading. Only 14 required that experience in production or at scale [11]. Plain “Product Manager” listings asked for AI experience almost as often as AI PM listings (66% vs. 70%). The median listing asked for 5 years of PM experience [11]. He suggests building real AI products people actually use, as opposed to fabricated credentials [11]. This adds to his earlier 651-role analysis.

Briefly

- **Row, then steer.** Lenny Rachitsky summarized a playbook for PMs at big companies, from Atlassian CPO Tamar Yehoshua. The PM and designer vibe-code an alpha. Once it shows pull, they bring in engineers. Then the PM steps back to align, prioritize and unblock [12]. It’s a practical answer to the “no one steering” problem Atlassian described earlier.
- **Rekhi’s six-month workflow update.** Sachin Rekhi now treats Codex as being as powerful as Claude Code [13]. He calls local markdown context

files “an anti-pattern” now that MCP-backed shared document repositories exist [13]. He also recommends rebuilding design systems in code, documented in Storybook, so engineers can turn prototypes into production code faster [13].

- **Companies agents can read.** Building on Patrick Collison’s argument, Hiten Shah says an agent should understand a business well enough to decide when it’s relevant and complete the purchase. He thinks founders will have to design for this from the start [14].

Sources

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3. r/ProductManagement comment by u/Almostnicklee
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5. Domain vs Product Craft: Which One Wins?
6. Simonetta Batteiger: Product Managers Need to Understand the Financials... Not Just the Users
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