Discovery and Positioning Rise as AI Compresses Execution

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AI is pushing the PM bottleneck from shipping to discovery and positioning. This brief covers the practical positioning framework gaining traction, why prototyping is becoming table stakes, and the tools, case studies, and career signals PMs should track.

Big Ideas

1) AI moved the bottleneck upstream

AI is no longer just changing how fast teams ship. Hiten Shah argues the core constraint is shifting from engineering velocity to knowing what to build [1]. Sachin Rekhi makes the same point for PM work: delivery has accelerated so much that discovery and design are now the limiting factors [2].

- **Why it matters:** Faster execution helps only if the team is pointed at the right problem.
- **How to apply:** Put more PM time into customer discovery, design decisions, and rapid prototyping. Treat making ideas tangible as part of the role, not a specialist add-on [2].

2) In the AI launch glut, positioning is becoming core PM work

As AI makes it easier to build and launch products, the harder problem is distribution: getting attention in an increasingly noisy market [3]. The positioning framework April Dunford outlines is designed to solve that by helping buyers quickly understand why a product is for them [4, 5].

- **Why it matters:** Better execution does not help if prospects cannot place your product or understand why it is different.

- **How to apply:** Build positioning around five components: competitive alternatives, distinct capabilities, differentiated value, best-fit accounts, and market category [5].

  "A single shift in positioning can mean the difference between a product that flops and one that breaks through" [3]

3) Slow growth now needs two diagnoses: attention and churn

One set of notes points to an attention problem: distribution is getting harder as launches multiply [3]. Paul Graham adds a different warning: churn is the worst reason to have slow growth, because it means people are trying the product and deciding they do not like it [6].

- **Why it matters:** Low awareness and poor retention can both depress growth, but they point to different problems.
- **How to apply:** First ask whether users are failing to notice the product or trying it and leaving. If the issue is attention, sharpen positioning; if the issue is churn, treat it as a product-value problem, not just a marketing gap [3, 6].

Tactical Playbook

1) Start positioning from the prospect's real alternatives

1. Ask: if we did not exist, what would the customer use? [5, 4]
2. Keep the answer grounded in the near term — "sell what's on the truck" [4, 5]
3. Include the status quo, which Dunford says accounts for about half of lost B2B opportunities and sometimes more than 80% [4, 5]
4. Run the exercise cross-functionally with product, sales, marketing, customer success, and the founder or business leader; experienced AEs are especially useful [4, 5]

- **Why it matters:** Weak positioning often starts with internal disagreement about what you are actually competing against [5].
- **How to apply:** Use real deal behavior, not hypothetical competitor lists, as the source of truth [4].

2) Translate capabilities into buyer language with a "so what?" test

1. List the distinct capabilities alternatives do not have [5]
2. Define the value those capabilities create [5]
3. Keep pushing until the value is stated in terms buyers understand — the "so what?" test [4, 5]
4. Avoid five common traps: assuming prospects understand a feature, stopping short of buyer value, abstracting value until it becomes generic, piling on too many themes, and confusing value with objection handling [4, 5]

- **Why it matters:** Teams often know their features better than their differentiated value.
- **How to apply:** Force every major claim to answer why a buyer should pick you over the alternatives in one clear story, not a long list of partial arguments [5, 4].

3) Counter product pessimism with evidence from winning deals

1. Watch for symptoms: overly broad ideal customers, long hypothetical competitor lists, dismissing sales explanations for wins, and treating PM only as problem identification [4, 5]
2. Re-center the discussion on where the product wins today, not every gap it may have tomorrow [4, 5]
3. Bring experienced sales voices into the room [4, 5]
4. Use a moderator who can challenge unsupported pessimism and ask for evidence [4, 5]

- **Why it matters:** If the team cannot articulate genuine strengths, it will struggle to position or sell them [5].
- **How to apply:** Separate roadmap-gap debates from positioning work; positioning should focus on current differentiated strengths [4, 5].

4) Rebuild the PM workflow around faster prototyping

1. Treat prototyping as expected work. Meta now uses a live vibe-coding interview where candidates build with Claude Code, Figma Make, or Lovable [2]
2. Use agentic tools where they are already strong. Rekhi says Claude Code has moved from experimental to essential for PMs [2]
3. Use the best tool for the task: analysis can now happen in Sheets, Excel, or directly against databases in Claude [2]
4. Apply the same principle to communication: Google Slides, PowerPoint, and Gamma can now materially speed presentation creation [2]

- **Why it matters:** Faster tooling changes what PMs can do directly without waiting for handoffs.
- **How to apply:** Build rough prototypes, analyze the data yourself, and communicate decisions visually — while protecting time for discovery and design, which are now scarcer inputs [2].

Case Studies & Lessons

1) Meta is signaling that prototyping is no longer optional

Meta's live interview format asks candidates to build prototypes with Claude Code, Figma Make, or Lovable [2].

- **Lesson:** PMs are increasingly expected to make ideas tangible in real time, not only describe them.
- **Apply it:** Add regular prototype reps to your workflow so rapid concept testing becomes normal.

2) Netflix shows what strategic focus really looks like

Aakash Gupta points to Netflix in 2009 focusing on three pillars — streaming transition, device expansion, and content licensing — while saying no to gaming until 2021 and no to sports until 2023 [7].

- **Lesson:** Strategy is not just choosing priorities; it is sustaining explicit no's over time.
- **Apply it:** Limit active pillars, then keep a visible list of attractive opportunities you are deliberately not pursuing.

3) Epic used a one-minute video to align 5,000 people

At Epic Games, one-minute videos for each Fortnite season helped coordinate 5,000 designers and engineers; Gupta's point is that you cannot align 5,000 people with a Google Doc [7].

- **Lesson:** For high-stakes cross-functional work, a concrete artifact can align faster than a written spec alone.
- **Apply it:** Pair major documents with a short visual prototype or narrative artifact when alignment matters most.

Career Corner

1) Discovery skill is rising in value

The core challenge is increasingly knowing what to build, not just building faster [1]. Rekhi also argues discovery is now the new constraint for PMs [2].

- **Why it matters:** PMs who only coordinate delivery will be less differentiated as execution gets faster.
- **How to apply:** Invest in customer discovery, design judgment, and problem selection — not just delivery mechanics.

2) Prototyping fluency is becoming a market signal

Prototyping has gone from advanced skill to job requirement in at least some hiring loops [2].

- **Why it matters:** This is no longer just a productivity hack; it is part of how PM capability is being evaluated.
- **How to apply:** Get comfortable building rough flows with Claude Code, Figma Make, or Lovable for concept testing [2].

3) Tool judgment now matters as much as tool familiarity

Rekhi's view is that data analysis is now platform-agnostic and presentation creation has caught up across mainstream and AI-native tools [2].

- **Why it matters:** PM leverage comes from choosing the right workflow for the task, not from loyalty to one tool.
- **How to apply:** Build a lightweight stack by task: one tool for prototyping, one for analysis, and one for communication — then switch based on the problem [2].

Tools & Resources

- **Advanced positioning guide:** A guide to advanced B2B positioning — best for teams stuck on competitor definition, differentiated value, or status quo losses [3, 4]
- **Video walkthrough:** A guide to advanced B2B positioning — useful if you want the five-part framework and roadblocks in video form [5]

A quick clip on the core value test:

A guide to advanced B2B positioning (17:23)

- **Strategy keynote:** https://www.youtube.com/watch?v=l5ORfS9h6hs — Gupta shared the Northeastern PM conference keynote for free after noting that 400+ PMs had paid $500+ to see it live [8]

- **PM tool stack to explore:** Claude Code for agentic prototyping, Figma Make and Lovable for fast mockups, Sheets/Excel/Claude for analysis, and Slides/PowerPoint/Gamma for presentation work [2]

Sources

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