

# Strategic Drift, Customer-Signal Discovery, and Groww's PMF Pivot

PM Daily Digest

2026-06-16

## Strategic Drift, Customer-Signal Discovery, and Groww's PMF Pivot

*By PM Daily Digest • June 16, 2026*

This brief focuses on the strongest new PM lessons from the latest sources: how roadmap decisions drift out of coherence, how to improve discovery when customer signal is thin, and what Groww's early pivot reveals about finding product-market fit. It also includes an AI moat framing, a pricing caution for AI-heavy SaaS, and one concise interview-prep takeaway.

### Big Ideas

- **Strategic drift is the invisible roadmap failure mode.** Individually defensible choices—ICP expansion, deal-closing features, and competitor response—can compound into a product “optimized for nobody,” not because any single decision was wrong, but because the product no longer reflects a clear growth thesis [1]. **Why it matters:** teams feel this as longer deal cycles, fragmented feature usage, and roadmap debates that get harder to resolve [1]. **Apply it:** protect a named center of gravity—core customer, job-to-be-done, and success definition—and use it to judge roadmap calls [1].

“This isn't technical debt. It's something harder to see: strategic drift.” [1]

- **AI advantage may come from a learning company OS, not isolated features.** Sachin Rekhi highlighted Satya Nadella's framing that the best firms differentiate by building a company OS that learns and compounds over time; most AI users still are not doing this, which can create a moat for those who do [2]. **Why it matters:** this shifts AI thinking from standalone features toward systems that improve as the company learns [2].

## Tactical Playbook

1. **Add a coherence check to quarterly planning.** Ask: *What customer type did we optimize for in the last 90 days, and does it match where our strongest growth is coming from?* [1] Also treat ICP creep as a product signal, not just a sales one, and label one-off deal accommodations so they do not quietly become strategy [1].
2. **Treat customer requests as clues, not specs.** Groww’s team found that users were not literally asking for “full transparency” or “frictionless payments”; those were the underlying needs inferred from repeated “why this, why not that?” questions [3]. **How to apply it:** start with direct conversations, then translate repeated requests into the deeper problem to solve.
3. **When you have few users, optimize for conversations, not reach.** Community advice for early B2B SaaS was to go where niche users already gather, seek warm intros, offer short pilots, share quick-win content, and use meetups or webinars to open dialogue [4]. The goal is not scale yet—it is a handful of real conversations that help you iterate and earn testimonials [4].

## Case Studies & Lessons

- **Groww’s pivot to transparency produced fast PMF signals.** The company started in 2016 with a robo-advisor hypothesis, but it did not work. Customer questions pushed the team toward a product with broader choice, transparency, and seamless onboarding and payments [3]. After launching that version in May 2017, Groww expected 100 customers in the first month and got 600; within 10–15 days, the team saw PMF signals through organic growth, retention, engagement, and customer love/NPS [3]. **Takeaway:** double down on what customers already show they love, and try to reduce startup risk to one open question—Groww says monetization was the main remaining unknown at that stage [3].



*Groww: If Your Customers Don't Love It or Hate It, You've Already Lost (4:10)*

- **A free tier can hide weak monetization in AI-heavy SaaS.** One founder described reaching 900 users for a macOS productivity app but only 3 paying customers, and argued that free tiers can attract usage without willingness-to-pay while still creating token costs [5]. **Takeaway:** if marginal AI costs are meaningful, check whether the free experience is producing real payment signal before scaling it [5].

### Career Corner

- **In a rough PM market, favor repetition over reshuffling.** One community response on Google PM prep said not to reschedule unless you are truly unready because the company may move on; instead, spend the next few weeks on daily product-sense cases, mock interviews, and focused study [6]. **Apply it:** if you are already in process, build a short daily loop of case practice and mocks rather than relying on timing changes to improve your odds [6].

### Tools & Resources

- **A better quarterly review prompt:** “What customer type did we optimize for, and does it match our strongest growth?” is a practical

addition to any roadmap review template because it surfaces drift quickly [1].

- **A strong PMF study session:** Groww's YC conversation is useful for teams working on consumer discovery, especially its examples of direct customer contact, design obsession, and founders using the product themselves for hours each day [3].

---

## Sources

1. Optimized for Nobody
2. X post by @sachinrekhi
3. Groww: If Your Customers Don't Love It or Hate It, You've Already Lost
4. r/startups comment by u/rianbrob
5. r/startups post by u/Waste-Project7822
6. r/prodmgmt comment by u/my\_peen\_is\_clean