A SHORT GUIDE

# The Product Manager's Playbook

The Second Edition in brief: every chapter's big idea, key points, checklist and one thing to try this week

THE ESSENTIALS



**Robert Merrell**
Founder, Product Advisory

P+ Product Advisory

# Contents

About The Essentials

**PART 1: FOUNDATIONS**

1. The Product Leader's Job, Now
2. Finding Problems Worth Solving
3. Discovery and Validation, from Interviews to MVP

**PART 2: STRATEGY**

4. Vision, Strategy and Positioning
5. Prioritization and Outcome Roadmaps
6. The Numbers: P&L, Unit Economics and Pricing
7. Managing a Product Portfolio

**PART 3: BUILDING**

8. Building and Leading the Product Team
9. From Requirements to Release, with Engineering and Design
10. Data, Analytics and Evidence-Based Decisions
11. Trust by Design: Security, Privacy and Compliance

**PART 4: CUSTOMERS**

12. Designing with Empathy
13. Go-to-Market and Launch
14. Customer Success and Retention

**PART 5: GROWTH**

15. Partnerships and Ecosystems
16. Scaling the Product and the Company
17. Building AI Products and Leading with AI Agents
18. The Integrated Playbook

# About The Essentials

*The Essentials* is a short companion to *The Product Manager's Playbook, Second Edition: Building Products in the Age of AI*. It distills each of the book's eighteen chapters to its core: the big idea, the key points, the most useful figure, the checklist and one thing to try this week.

Use it three ways:

- **Before you read the book,** to see the whole map in an hour.
- **After you read it,** as a refresher when a real decision comes up.
- **With your team,** as the starting point for a discussion, one chapter at a time.

Each chapter summary follows the same pattern:

- **The big idea:** the chapter in two or three sentences.
- **Key points:** what to remember.
- **Figure:** the one picture worth keeping.
- **Checklist:** the questions to ask yourself.
- **Try this week:** one practical step.

The book follows a fictional company, Brindlepath, which sells care-coordination software to health systems. Brindlepath and everyone in its story are invented; any resemblance to real organizations or people is coincidental. The full book explains each idea in depth, with worked examples, common mistakes and sources for every real-world figure.

## The book at a glance

**Part 1, Foundations.** The product leader owns the outcome, and finds problems worth solving before building anything.

**Part 2, Strategy.** Choose where to play and how to win, plan around outcomes, know your numbers, and manage products as a portfolio.

**Part 3, Building.** Build safe, clear teams; work in thin slices with engineering and design; use data well; design for trust.

**Part 4, Customers.** Design for people's real environments, launch so customers notice, and make sure they succeed.

**Part 5, Growth.** Partner for value, scale without custom work, build AI products with discipline, and connect it all into one system.

PART 1

# Foundations

# 1. The Product Leader's Job, Now

**The big idea.** The product leader owns the outcome: whether the product creates value for customers and the business, and whether the team is working on the right problem. AI now drafts much of the work, which makes human judgment more important, not less.

**Key points**

- Every product decision answers five questions: is it **valuable, usable, feasible, viable and trustworthy?** Trust is new in this edition.
- The role evolved from feature coordinator, to backlog owner, to outcome owner, and now to **orchestrator** of people and AI agents.
- Four pillars support the job: **market understanding, financial insight, customer-centered innovation, and trust and responsibility.**
- Great product leaders state the problem in one sentence, talk to customers weekly, separate the request from the need, write decisions down, and say no kindly.
- AI removes toil and raises the bar on judgment. **Delegate the first draft, never the final call.**
- Time that AI frees should go to customers, decisions and the team, not to more meetings.




The four pillars of product leadership.

## Checklist

- [ ] Can you state the outcome your product is accountable for in one sentence?
- [ ] Have you answered all five questions for your top priority?
- [ ] Which pillar is your weakest, and what will you do about it?
- [ ] Do you keep a decision log the team can read?
- [ ] Where are you relying on AI output without reading the evidence behind it?

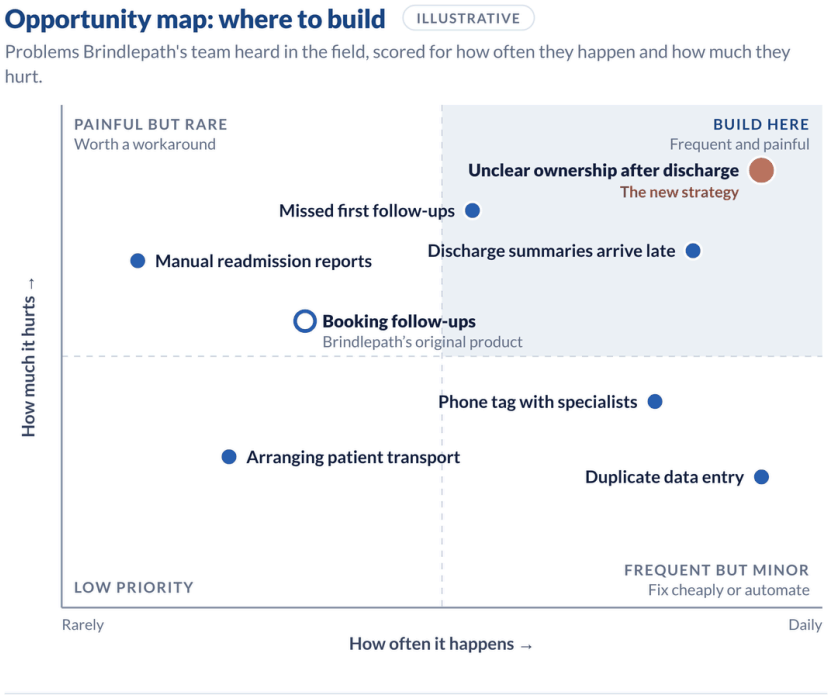
**Try this week.** Sort a week of your calendar into customer understanding, decisions, team leadership and coordination. Pick five hours of coordination to hand to an AI assistant, and protect those hours for customers.

# 2. Finding Problems Worth Solving

**The big idea.** Products rarely fail because they could not be built. They fail because they solved a problem nobody valued enough. Find the problem, the people who have it and the people who pay, before you design anything.

**Key points**

- Write a **problem statement** that names who, their goal, the obstacle, the consequence and today's workaround, with no solution in it.
- Look for the **job to be done:** the functional, emotional and social progress people are trying to make.
- In business software the user, buyer and decision-maker differ. Map the **buying group** and what each role needs to believe.
- Score problems by **how often they happen and how much they hurt.** Build where both are high.
- Size the market **bottom up,** from countable customers and a realistic price.
- Your biggest competitor is usually **the status quo:** the spreadsheet, the phone call, doing nothing.
- Learn the regulatory, data and integration constraints first; they shape the solution.




Opportunity map: build where problems are frequent and painful (illustrative).

## Checklist

- [ ] Does your problem statement name a specific person and contain no solution?
- [ ] Have you mapped the buying group and what each role needs to believe?
- [ ] Is your market estimate built from numbers you could verify?
- [ ] Have you listed the status quo and “do nothing” as competitors?
- [ ] Have you seen the problem in the field, not just in desk research?

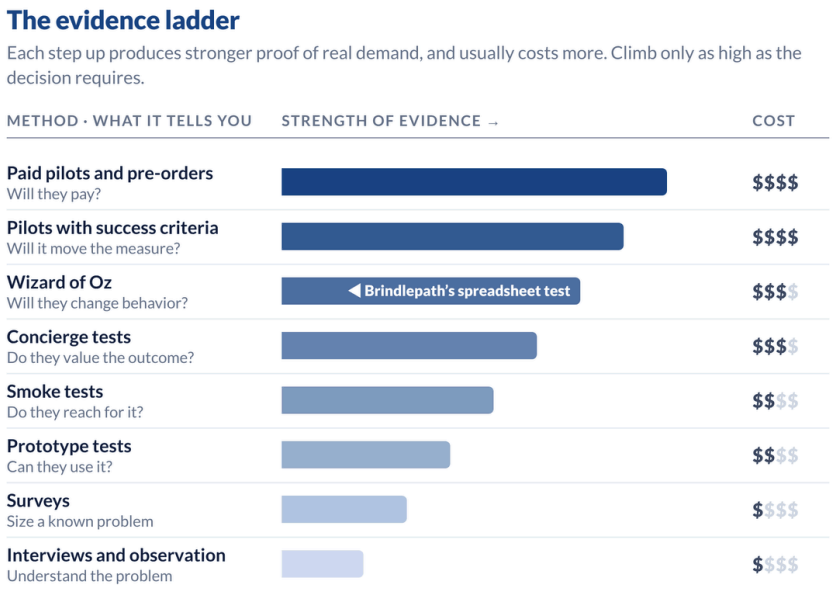
**Try this week.** Show your problem statement to a customer, a seller and an engineer, and ask each, “What is wrong with this?” Rewrite it after every conversation.

# 3. Discovery and Validation, from Interviews to MVP

**The big idea.** Discovery is a weekly habit, not a project phase. Test the riskiest assumptions cheaply, match the strength of evidence to the size of the decision, and build the smallest product that proves real value.

**Key points**

- The product trio should talk with customers **every week.**
- Interview about **specific past events,** not opinions about your idea. Follow the workarounds. Talk to people who said no.
- List assumptions across desirability, usability, feasibility, viability and trust. **Test the riskiest first.**
- Climb the **evidence ladder** only as high as the decision needs: interviews, prototypes, concierge and Wizard of Oz tests, then pilots and pre-orders.
- An MVP is the smallest thing that **delivers real value** and tests the core assumption. Write down what it leaves out.
- Pilots need a measure, baseline, threshold, duration and **named decision-maker,** agreed in writing.
- AI is excellent at synthesis. Humans own the conversations and conclusions. **Synthetic users are not evidence.**




The evidence ladder.

## Checklist

- [ ] Does your trio talk with customers every week?
- [ ] Have you tested your riskiest assumption first?
- [ ] Can you state your MVP in one sentence, with a list of what it leaves out?
- [ ] Does every pilot end in a decision?
- [ ] Is every AI tool that touches customer data approved for it?

**Try this week.** Pick the assumption with the highest importance and least evidence, and design an experiment that could disprove it within two weeks.

PART 2

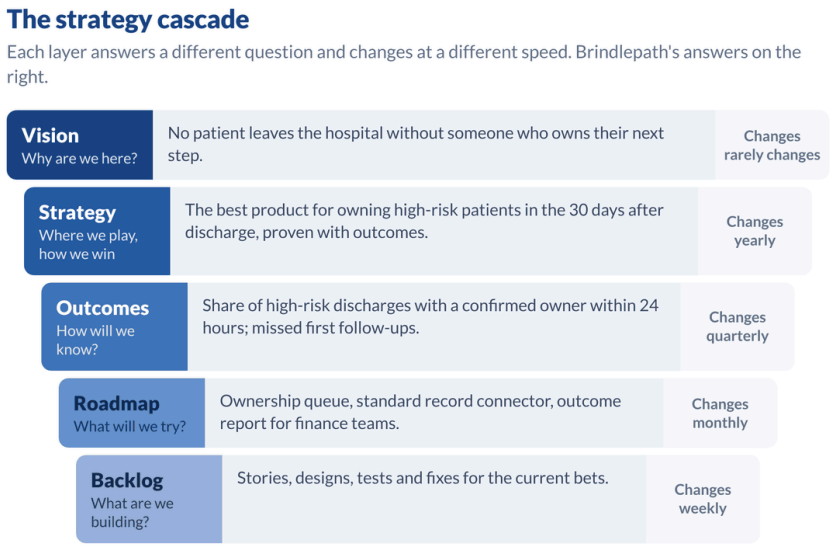
# Strategy

# 4. Vision, Strategy and Positioning

**The big idea.** Strategy is a set of choices: a clear diagnosis, a guiding policy and coherent actions, including what you will stop doing. Positioning helps customers understand those choices.

**Key points**

- Keep the cascade straight: **vision** (why), **strategy** (where to play, how to win), **outcomes** (how we'll know), **roadmap** (what we'll try), **backlog** (what we're building).
- A good vision describes **the customer's world,** not your product, and is concrete enough to rule things out.
- Good strategy has a **diagnosis, a guiding policy and coherent actions** (Rumelt).
- **Where to play** and **how to win** must fit each other (Lafley and Martin).
- Build positioning **from the competitive alternatives outward,** and choose the category last (Dunford).
- Fit the strategy on **one page,** and repeat it until people can repeat it back.
- AI commoditizes features. Durable advantage comes from workflow depth, data, trust and relationships.




The strategy cascade.

## Checklist

- [ ] Is your vision one sentence about the customer's world?
- [ ] Does your strategy contain a diagnosis, policy and actions?
- [ ] Does your positioning start from what customers would do without you?
- [ ] Is there a written, shared not-doing list?
- [ ] Could a competitor with the same AI tools copy your advantage in a quarter?

**Try this week.** Write your strategy on one page. Ask a new engineer to name two ideas it rules out. If they can't, rewrite it.

# 5. Prioritization and Outcome Roadmaps

**The big idea.** Roadmaps communicate direction, not promises. Frame work as outcomes, show confidence honestly, and make the trade-offs visible, including the capacity that keeps the product healthy.

**Key points**

- **Outcomes over output:** an outcome is a change in customer behavior that drives results.
- Use **Now, Next, Later:** problems and measures, with detail and confidence thinning from left to right, and dates only where they are real.
- Frameworks such as **RICE, weighted scoring, Kano and cost of delay** structure the conversation. They do not make the decision, and each has biases.
- When two methods disagree sharply, **discuss the item** instead of trusting a formula.
- Say no **with reasons and an alternative.**
- **Decide the capacity split first:** new outcomes, reliability, security, debt and discovery.
- Archive backlog items no current customer problem supports.




Illustrative roadmap for the fictional Brindlepath example. Format after Janna Bastow's Now-Next-Later roadmap.

> An outcome roadmap: Now, Next, Later.

## Checklist

- [ ] Is every roadmap item a problem or outcome, with a measure?
- [ ] Are dates shown only for real commitments?
- [ ] Do you know your prioritization framework's biases?
- [ ] Is capacity for reliability and security set before features compete?
- [ ] Do AI items have quality targets, not just ship dates?

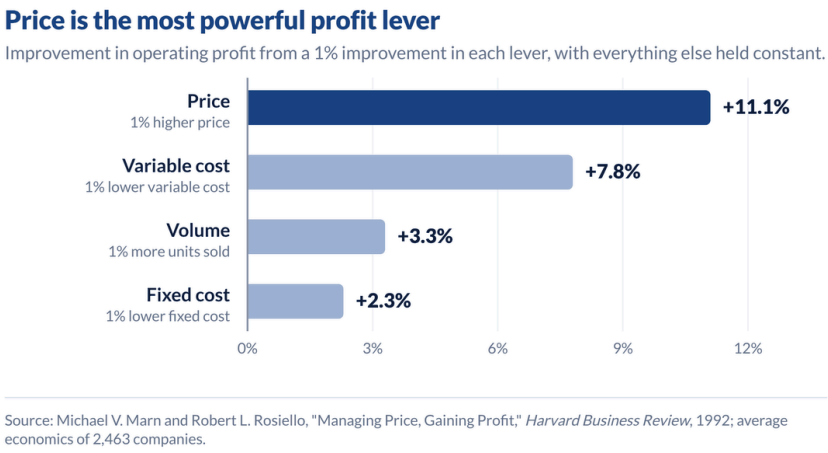
**Try this week.** For every roadmap item, write the problem and the measure. Anything without both goes to a "needs a problem" list.

# 6. The Numbers: P&L, Unit Economics and Pricing

**The big idea.** Every product decision is a financial decision. Know your gross margin, your cost to serve, your payback and your retention, and price to the value customers receive.

**Key points**

- Read the **P&L:** revenue, cost of revenue, gross margin, operating expenses, operating income.
- **Gross margin** is the clearest sign of whether software is a good business. Custom work and AI costs erode it.
- Track **CAC, payback, gross and net revenue retention, and LTV to CAC.**
- Some customers cost more to serve than they pay. **Find them.**
- Pricing is the most powerful lever: a **1 percent price improvement** raised operating profit by about 11 percent in a classic study of 2,463 companies.
- Price to **value,** choose a **pricing metric** that grows with value, and package deliberately.
- Business cases need the **cost to run,** not just the cost to build, and a range rather than one number.




> Price is the most powerful profit lever. Source: Marn and Rosiello, Harvard Business Review, 1992.

### Checklist

- [ ] Do you know your gross margin and what drives it?
- [ ] Do you know your cost to serve a typical customer, including AI?
- [ ] Is your price based on customer value?
- [ ] Does your pricing metric grow with the value you deliver?
- [ ] Do proposals include running costs and a range?

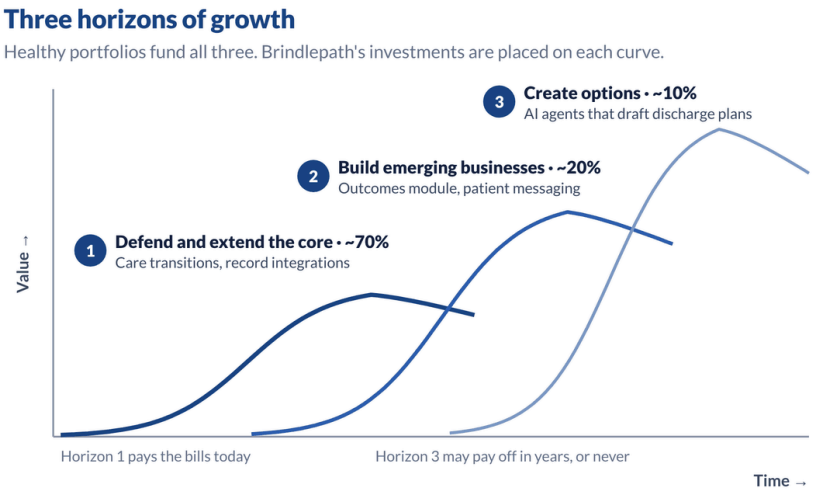
**Try this week.** Calculate revenue, cost to serve, gross margin, acquisition cost and payback for your typical, smallest and most demanding customers. Compare them.

# 7. Managing a Product Portfolio

**The big idea.** With more than one product, the question changes from “what next?” to “how much should each get, and what should stop?” Manage each product for its stage, and fund the future as well as the present.

**Key points**

- Products move through **introduction, growth, maturity and decline.** Measure each on what matters at its stage.
- A **portfolio map** (growth, margin, revenue) turns separate pitches into one shared picture.
- Fund **three horizons:** the core, emerging businesses and future options. Roughly 70/20/10 is a common guideline.
- Build **platform** capabilities from real needs of two or more products, not speculation.
- **Bundle only after integrating** identity, data and design.
- **Retire products well:** reasons, notice, migration, careful data handling, and redeployed capacity.
- Portfolio reviews should end with **decisions,** not status updates.




Three horizons of growth.

## Checklist

- [ ] Is each product measured for its life-cycle stage?
- [ ] Does leadership discuss a shared portfolio map?
- [ ] Is the horizon split explicit?
- [ ] Do you have a responsible retirement plan for declining products?
- [ ] Have you asked whether an AI-native approach could replace your core?

**Try this week.** Plot your products or modules by growth and margin, label each stage, and write one word for each: invest, hold, fix or retire.

PART 3

# Building

# 8. Building and Leading the Product Team

**The big idea.** How a team works together matters more than who is on it. Build psychological safety, clarity and stable, mission-driven teams, with the product trio at the core.

**Key points**

- The **product trio** (product, design, engineering) owns discovery and the outcome together.
- Bring **specialists** such as clinical, security and compliance experts in at discovery, not at launch.
- Google's research found five dynamics of effective teams, with **psychological safety** the foundation.
- Build safety by **going first on mistakes,** asking what you're missing, thanking dissent and closing the loop.
- Give teams **missions, not feature lists;** organize around customer journeys; **write down decision rights;** keep teams stable.
- Hire for **curiosity, clear writing, judgment, influence and ownership.** Test the real work.
- Every AI agent a team runs in production needs a **named owner.**




> The five dynamics of effective teams. Source: Google re:Work.

### Checklist

- [ ] Does each team have an outcome mission?
- [ ] Does each trio do discovery together?
- [ ] Are decision rights written down?
- [ ] Do you run blameless reviews?
- [ ] Do your product managers get regular coaching?

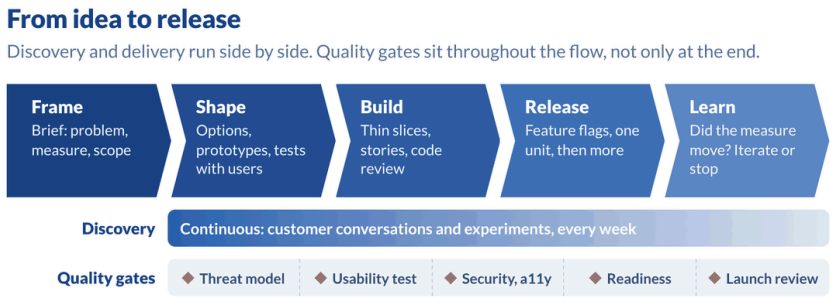
**Try this week.** Ask your team to rate the five dynamics anonymously, one to five. Discuss the lowest score and agree one change to try for a month.

# 9. From Requirements to Release, with Engineering and Design

**The big idea.** Requirements are a conversation, not a contract. Start with a short brief, slice thin, release often, and put quality gates throughout the flow.

**Key points**

- A **one-page brief:** problem, measure, who it's for, what's known and assumed, scope, **out of scope,** must-haves and open questions.
- **User stories** need concrete acceptance criteria, including **privacy, audit and accessibility.**
- Involve **design from the first conversation** and design for the real environment.
- Bring **engineers in early** to shape solutions, and treat estimates as forecasts.
- **Slice thin, release often,** and use **feature flags** to separate deployment from release.
- Speed and stability **go together** (Accelerate). Never use delivery metrics to rank people.
- Review every launch against **the measure it was meant to move.**




From idea to release.

## Checklist

- [ ] Does significant work start with a one-page brief?
- [ ] Do acceptance criteria include privacy, audit and accessibility?
- [ ] Does “done” include testing, security and measurement?
- [ ] Do launches have a readiness review and rollback plan?
- [ ] Are AI-generated requirements and code reviewed by accountable people?

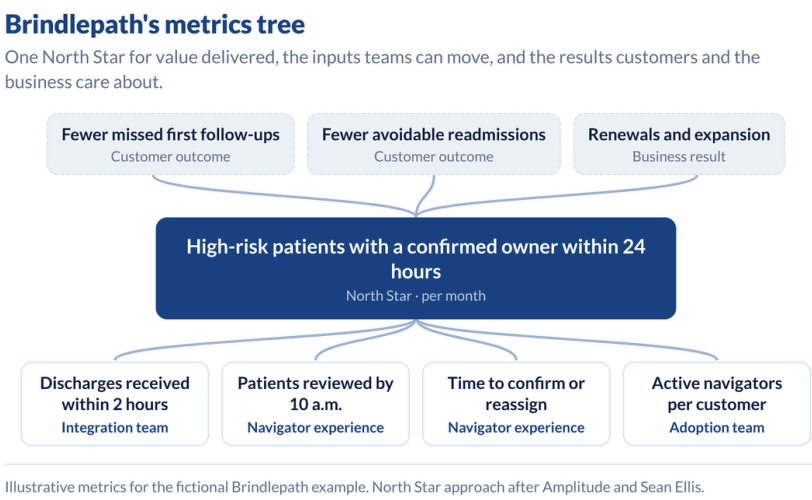
**Try this week.** Write the brief for your next big piece of work with the whole trio in under an hour. Pay attention to “out of scope.”

# 10. Data, Analytics and Evidence-Based Decisions

**The big idea.** Be data-informed, not data-driven. Agree on a North Star and the inputs that drive it, watch retention honestly, and pair numbers with stories.

**Key points**

- A **North Star** captures value delivered and leads revenue. **Input metrics** are what teams can move.
- Remove **vanity metrics.** If a number changing wouldn't change a decision, drop it.
- **Retention by cohort** is the most honest measure: look for curves that flatten.
- Correlation is not causation. Use **experiments or careful comparisons** before claiming impact.
- **Decide measures before** looking at results.
- Build foundations: an event taxonomy, **one definition per metric,** and no personal data in unapproved tools.
- Join usage, support and contract data to find **leading indicators** of renewal.




A metrics tree: North Star, inputs and outcomes (illustrative).

## Checklist

- [ ] Do you have a North Star and owned input metrics?
- [ ] Have vanity metrics left the main dashboard?
- [ ] Do you track retention by cohort?
- [ ] Is each key metric defined once, for people and AI tools alike?
- [ ] Do you pair numbers with customer conversations?

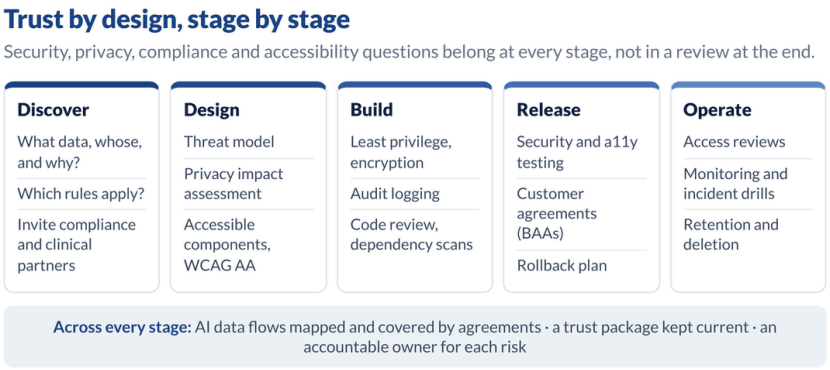
**Try this week.** Draw your metrics tree, remove every dashboard chart that isn’t on it, and call two customers about the input that moved most last month.

# 11. Trust by Design: Security, Privacy and Compliance

**The big idea.** Trust is a product feature and the fourth pillar of leadership. Build security, privacy, compliance and accessibility in from discovery, not in a review at the end.

**Key points**

- Breaches are costly, and costliest in healthcare: **$7.42 million on average** in 2025, against $4.44 million across industries (IBM).
- Know the rules that apply: in US healthcare, **HIPAA and business associate agreements,** interoperability rules, FDA software oversight, state privacy laws and accessibility rules.
- **Security by design:** threat modeling, least privilege, strong identity, encryption, audit logs, secure development, a practiced incident plan.
- **Privacy by design:** collect the minimum, use data only as stated, default to private, plan for deletion.
- **Accessibility** is part of quality: 94.8 percent of top home pages had detectable failures (WebAIM, 2025). Target WCAG AA.
- Make compliance a **partner,** and keep a **trust package** current.
- Map every **AI data flow,** guard against prompt injection, and evaluate AI for accuracy and fairness.




> Trust by design, stage by stage.

## Checklist

- [ ] Do significant features get a threat model and privacy review?
- [ ] Is WCAG AA part of your definition of done?
- [ ] Is there a practiced incident response plan?
- [ ] Do you maintain a trust package?
- [ ] Is every AI data flow covered by the right agreements?

**Try this week.** Walk your most sensitive workflow with engineering, design and compliance: what data, who can see it, is it logged, and can a keyboard-only user complete it?

PART 4

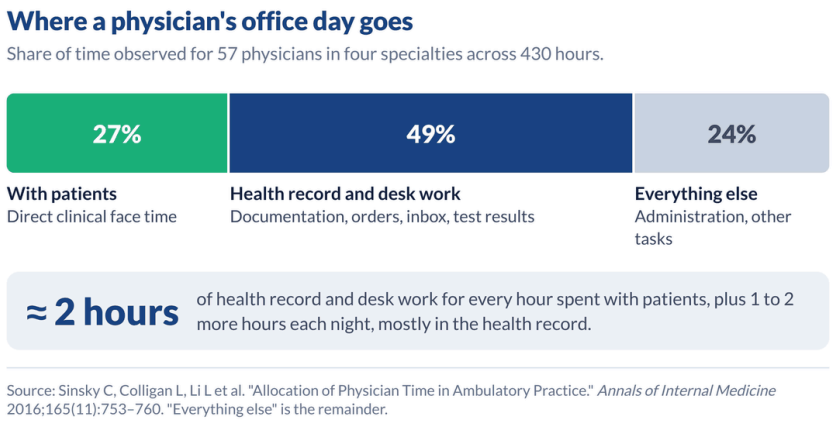
# Customers

# 12. Designing with Empathy

**The big idea.** Products succeed or fail in the user's real environment, not in the lab. Empathy is a method: understand context, goals and constraints by watching real work.

**Key points**

- Physicians spend **nearly two hours on the health record and desk work for every hour with patients** (Sinsky, 2016). Every product either adds to that burden or relieves it.
- **Contextual inquiry and shadowing** find what lab testing misses.
- **Journey maps** make pain points visible to the whole team. **Personas** must summarize evidence.
- Design for **interruption,** prevent errors and **offer undo,** keep the screen still, minimize clicks.
- Remember **users who never log in,** such as patients, students and customers.
- Trust users' **problems;** treat their proposed solutions as one input.
- Design AI features around **the reviewer's time.**




Where a physician's office day goes. Source: Sinsky et al., 2016.

### Checklist

- [ ] Has your trio watched users in their real environment this quarter?
- [ ] Do you have a journey map built from field research?
- [ ] Does the product survive interruptions and make errors easy to undo?
- [ ] Do design reviews consider people who never log in?
- [ ] Do you track usability measures for key tasks?

**Try this week.** Arrange half a day watching a user at work for each member of the trio. Bring back one workaround, one frustration and one moment the product helped.

# 13. Go-to-Market and Launch

**The big idea.** Building the product is half the job. A launch gets value into customers' hands and heads, with the right message for each audience and teams ready to carry it.

**Key points**

- A GTM plan answers **who, what message, which channels, what price, how customers succeed and how you'll measure it.**
- Choose a motion, or blend: **sales-led, product-led or partner-led.**
- Write **messaging per role:** the problem they feel, the outcome they want, the proof they need.
- **Tier launches** and decide the tier when the work is planned.
- **Enable sales and success** with the story, a demo, objections, boundaries and practice.
- **Price pilots,** design them for expansion, and agree the expansion terms in advance.
- In regulated markets plan for **approvals, training, evidence for claims and procurement timelines.**

### Launch tiers: match the effort to the stakes

Decide the tier when the work is planned, so every team has time to prepare.

| | | |
|---|---|---|
| **Tier 1**<br>New product, major capability, new positioning | **Full launch:** messaging for every audience, sales and success enablement with practice, external announcement, customer events, success measures at 30, 60 and 90 days. | **Example**<br>Brindlepath's outcome report (relaunched) |
| **Tier 2**<br>Significant feature for some customers | **Targeted launch:** direct communication to affected customers, enablement for the teams who will discuss it, updated demo and help content. | **Example**<br>One-step reassignment |
| **Tier 3**<br>Improvement or fix | **Quiet launch:** release note, help article update, internal heads-up to support. | **Example**<br>Faster patient search |

> Launch tiers: match the effort to the stakes.

## Checklist

- [ ] Is there messaging for each role in the buying group?
- [ ] Is each launch tiered early?
- [ ] Are sellers enabled with practice, not just slides?
- [ ] Do pilots have a fee and expansion terms?
- [ ] Do you measure adoption at 30, 60 and 90 days?

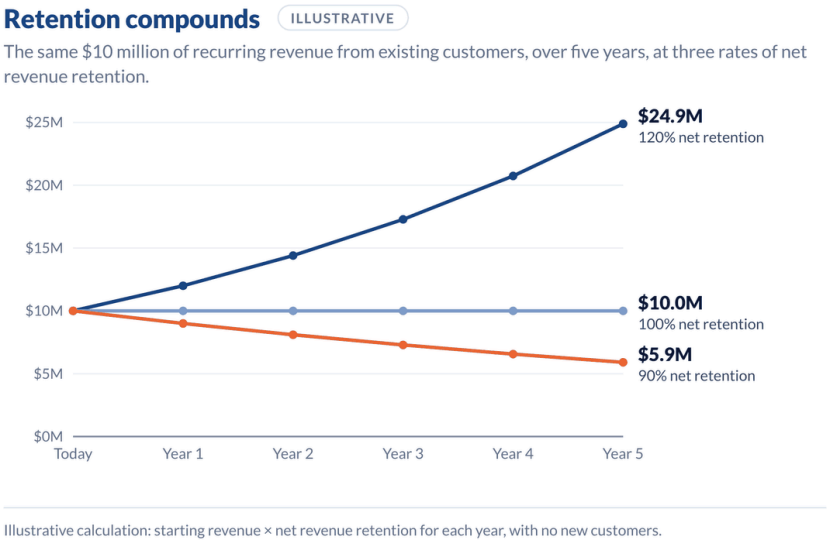
**Try this week.** Ask a salesperson to demo your next release to you cold. Every question they can't answer goes into your enablement plan.

# 14. Customer Success and Retention

**The big idea.** Subscription businesses win at renewal, every month. Customer success works proactively so customers achieve the outcomes they bought, and retention compounds.

**Key points**

- **Support** fixes problems; **customer success** drives outcomes.
- Retention compounds: $10 million at 90 percent net retention becomes about **$5.9 million** in five years; at 120 percent, about **$24.9 million.**
- The life cycle: **onboard, adopt, realize value, renew, expand.**
- **Time to first value** has the biggest effect on whether customers stay.
- **Health scores** should weight outcomes and adoption most. Friendliness can hide a failing deployment.
- Run **business reviews** around the customer's outcomes, with the executive sponsor in the room.
- Feed customer evidence into product, and **close the loop** with customers whose ideas you used.




Retention compounds (illustrative).

## Checklist

- [ ] Do you track net and gross revenue retention?
- [ ] Is time to first value defined and tracked?
- [ ] Does every at-risk account have an owner and a plan?
- [ ] Do success and product teams meet regularly?
- [ ] Do you build advocacy with permission and accurate claims?

**Try this week.** For your five largest customers, check the outcome trend, active users by site and the executive sponsor. Anyone slipping gets an owner and a plan.

PART 5

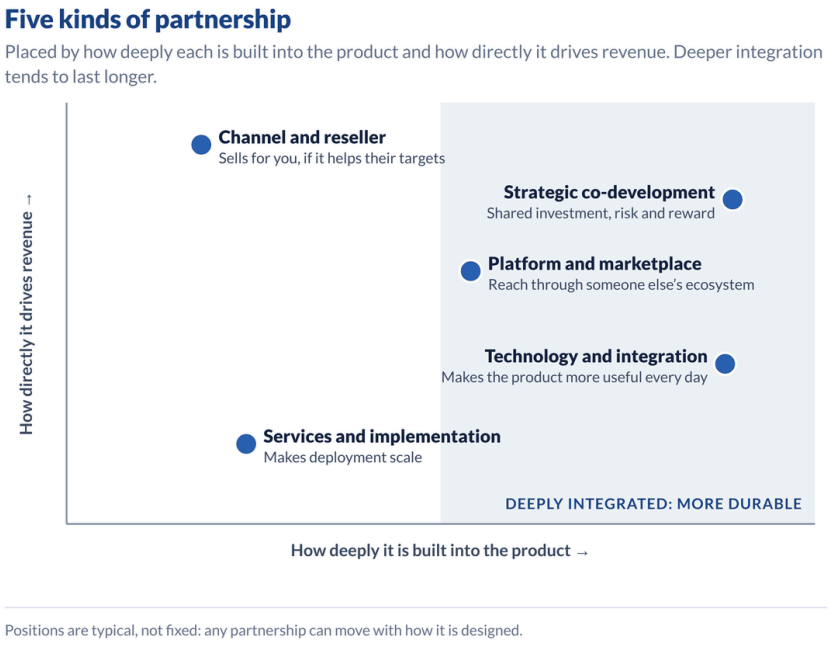
# Growth

# 15. Partnerships and Ecosystems

**The big idea.** Good partnerships create value for both sides every day, in the normal course of their work. Partnerships that depend on goodwill fade.

**Key points**

- Partner to **complete the product, extend reach, strengthen the outcome or accelerate innovation.**
- Types: **technology and integration, platform and marketplace, channel, services, and strategic co-development.**
- Assess **mutual value, customer overlap, workflow fit, incentive alignment, commitment and risk.**
- Start with a **pilot,** name **owners on both sides,** agree shared measures.
- Ecosystems grow from **open, documented interfaces,** a partner program and shared success stories.
- **Monitor integrations,** diversify away from single platforms, and end partnerships well.
- Treat **AI model providers** as strategic partners, and keep the ability to switch.




Five kinds of partnership.

## Checklist

- [ ] Can you state what both sides gain from each partnership?
- [ ] Do partners' incentives reward working with you?
- [ ] Are data agreements in place before data flows?
- [ ] Are partner integrations monitored?
- [ ] Could you switch AI model providers?

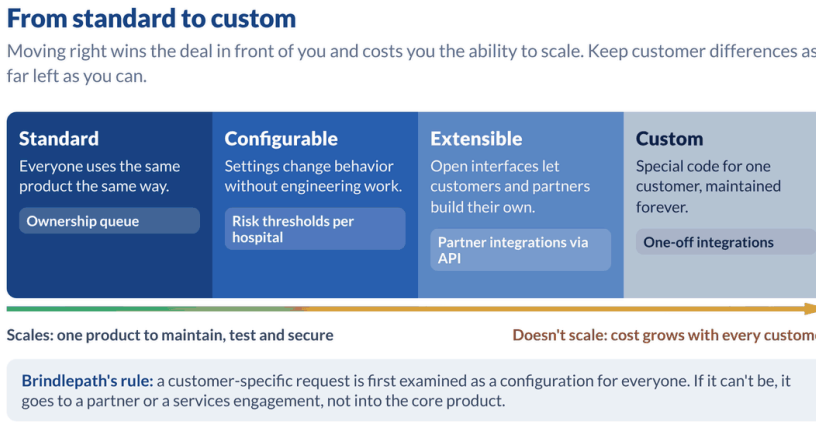
**Try this week.** Score each partner on overlap, fit, incentives and commitment. For any you can't write the partner's gain for, have a frank conversation.

# 16. Scaling the Product and the Company

**The big idea.** Scaling means changing how the product and company work, so growth makes things better instead of breaking them. The most important product decision is how you handle customer differences.

**Key points**

- **Configure, don't customize.** Push customer differences toward standard, configurable and extensible options.
- Scale technology with **multi-tenancy, standard integrations, service level objectives, error budgets and observability.**
- Protect quality with **capacity allocation,** automation, flags and blameless reviews.
- Make compliance systematic: **certifications early,** compliance built into the platform.
- Expand **one direction at a time,** from a strong core.
- **Conway's law:** teams around customer journeys produce products without seams.
- AI changes the economics of scale, but **AI costs grow with use.**




From standard to custom.

## Checklist

- [ ] Do you have a rule for customer-specific requests?
- [ ] Do you have SLOs and an error budget?
- [ ] Will monitoring catch silent integration failures?
- [ ] Are teams organized around customer journeys?
- [ ] Is cost per customer, including AI, tracked?

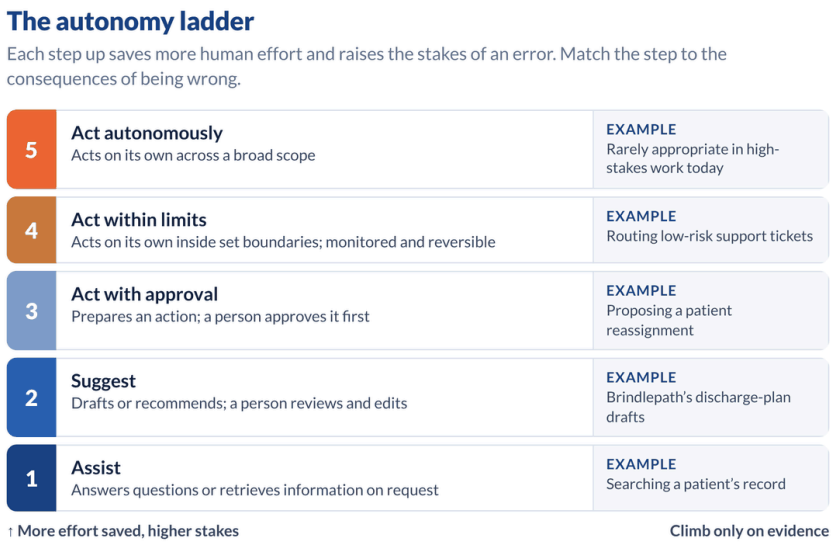
**Try this week.** List every customer-specific setting and code path. Mark each: make it configuration for all, move it to a partner, or retire it.

# 17. Building AI Products and Leading with AI Agents

**The big idea.** Impressive AI demos are easy; reliable AI products are not. Start with the problem, match autonomy to the cost of an error, evaluate rigorously, and lead agents like accountable team members.

**Key points**

- **88 percent** of organizations use AI somewhere, but only **23 percent** are scaling AI agents (McKinsey, 2025). The gap is where product leadership matters.
- AI fits language, variety and drafts where errors can be caught. It fits poorly where answers must be exact and unreviewed.
- Climb the **autonomy ladder** (assist, suggest, act with approval, act within limits, act autonomously) only on evidence.
- Design for trust: **sources, uncertainty, easy correction, control and clear labels.**
- **Evaluation** separates demos from products: a realistic set, expert criteria, thresholds, gated releases and production monitoring.
- **Ground** AI in the right data, watch **cost and speed,** and guard against bias, manipulation and privacy risk.
- Give every agent a **job description, an owner, limited permissions and regular review.** Humans stay accountable for decisions.




The autonomy ladder.

## Checklist

- [ ] Is each AI feature solving a validated problem?
- [ ] Is autonomy matched to the consequences of being wrong?
- [ ] Does an evaluation set with thresholds exist before the feature?
- [ ] Is quality monitored in production?
- [ ] Does every agent have an owner and limited permissions?

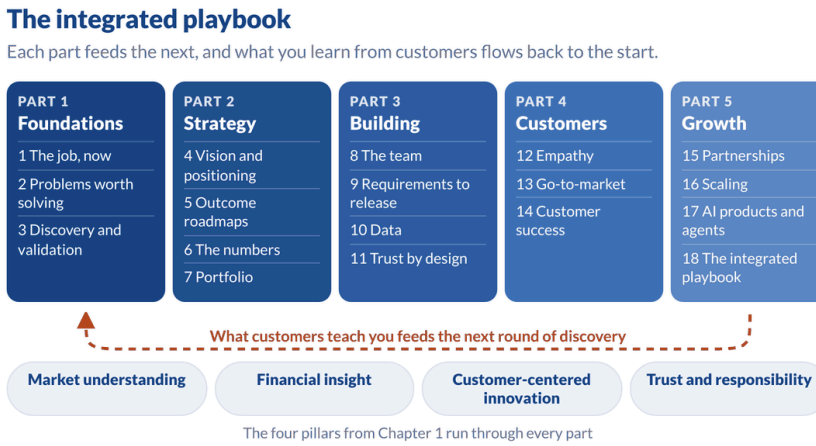
**Try this week.** Write the evaluation plan for one AI feature. If you can't define the evaluation set and criteria, build those before another line of the feature.

# 18. The Integrated Playbook

**The big idea.** The pieces only work together. Problem, strategy, numbers, team, trust, customers, partners and AI form one system, held together by a steady operating rhythm.

**Key points**

- Decisions in one area shape every other: the problem you choose sets the price you can charge, which sets the team you can afford.
- The **four pillars** run through every part of the work.
- Keep a rhythm: **weekly** learning, **monthly** results, **quarterly** investment, **yearly** strategy.
- In a new role, spend **30 days listening, 30 diagnosing and aligning, 30 deciding and communicating.**
- The core of the job, understanding people, choosing well, building trust and owning the outcome, **stays human.**




The integrated playbook.

## Checklist

- [ ] Do you consider how each decision affects the whole system?
- [ ] Do you keep a weekly, monthly, quarterly and yearly rhythm?
- [ ] Is your strategy on one page, refreshed yearly?
- [ ] Do you look at the results, and change course when they tell you to?

**Try this week.** Put the operating rhythm on your calendar for the next quarter, starting with one customer conversation for every trio this week.