AI-Assisted PM Workflows

AI-Assisted PM Workflows: Summary

> ***Purpose:*** *Quick reference of established workflows for working with Claude. Shareable overview for demonstrating AI integration capabilities.*

At a Glance

Workflow	Use Case	Key Benefit
Systematic Landscape Analysis	Market research, competitive intel	~85% time reduction
Two-Phase Prompting	Moving from research to action	Eliminates analysis paralysis
Executive Summary Framework	C-level presentations	Decision-ready outputs
Validate Each Fact Always	All research outputs	Presentation-ready with citations
Reconciling Conflicting Data	Strategic decisions	Better synthesis than either/or
Portfolio Update Process	Knowledge capture	Automated data collection

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Workflow Details

1. Systematic Landscape Analysis

What it is: Structured research methodology for comprehensive market/competitive analysis.

The Process: 1. 10-15 targeted web searches (not random browsing) 2. 50+ sources analyzed (90% from last 2 years) 3. Source diversity: government, academic, industry, nonprofit 4. Cross-verification of key statistics 5. Complete APA citations throughout

Output Structure: - Executive Summary - Detailed findings by research area - Competitive Matrix - Strategic Recommendations - Key Questions for Further Exploration - Full References (APA format)

Results: Reduces research time from 2-3 weeks to 3-4 hours while maintaining academic rigor.

Used for: Vibe Entrepreneurship project - analyzed 50+ sources to inform strategic recommendation.

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2. Two-Phase Prompting (Theory → Execution)

What it is: A pattern for moving from recommendations to concrete action.

The Process:

Phase 1 - Theory:

```
"How should I [organize/approach/structure] [TOPIC]?
What does research say? What are best practices?"
```

→ Get research-backed recommendations

Phase 2 - Execution:

```
"Follow the implementation steps for [CHOSEN APPROACH].
Give me specific tasks, templates, and setup instructions."
```

→ Get concrete deliverables

Why it works: - Phase 1 satisfies "am I doing this right?" anxiety - Phase 2 eliminates "but how do I start?" barrier - Prevents both analysis paralysis AND implementation stall

Used for: Knowledge base setup, process design, tool decisions.

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3. Executive Summary Framework

What it is: Structure for presenting recommendations to executives.

The Formula:

```
Tension → Recommendation → Rationale → Implications → Next Steps
```

Structure: 1. **Tension** (2-3 sentences): Frame the competing paths 2. **Recommendation** (1 sentence, bold): State your position 3. **Rationale** (3-5 bullets): Evidence-based support 4. **Implications** (2-3 bullets): Financial, timeline, resource impact 5. **Next Steps** (2-3 specific actions): What you need from them

Key insight: Executives want decisions, not options. Take a stance.

Used for: CEO presentation on Vibe strategic direction - achieved executive buy-in.

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4. "Validate Each Fact Always" Configuration

What it is: A Claude user preference that transforms output quality.

The Setting: > "Validate each fact always and make sure any claim or statement is supported by a relevant, accessible and valid source. Make sure all artifacts have a 'references' section in APA format."

Impact:

Before	After
"Most startups fail in first few years"	"20% fail within year one (SBA, 2024)"
Plausible but unverified	Presentation-ready with citations
Required manual fact-checking	Directly usable in executive presentations

Why it works: Changes Claude's behavior to actively search for verifiable sources rather than synthesizing from training data.

Used for: All research outputs, landscape analyses, strategic recommendations.

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5. Reconciling Conflicting Data Sources

What it is: A thinking pattern for when data sources disagree.

The Approach:

Instead of picking one source over another, ask:

```
"What would it mean if BOTH data sources are valid?
Could they be measuring different dimensions?"
```

Framework: 1. What is each source actually measuring? 2. Could these be different stages/dimensions? 3. Is there a frame where both are true? 4. What would a "both/and" approach look like?

Example: - Survey said: Educational product (students want to learn) - Landscape said: Operational product (market opportunity) - Synthesis: They're measuring different journey stages → Phased approach

Used for: Vibe strategic recommendation - phased hybrid strategy instead of binary choice.

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6. Portfolio Update Process (MCP-Enabled)

What it is: Automated system for capturing and documenting AI-assisted work.

Architecture:

```
Claude.ai (with MCP integrations)
├── Reads Asana → Project progress, tasks
├── Reads Google Drive → Deliverables, documents
└── Creates tasks → Capture learnings directly

        ↓ (you copy summary)

Claude Code (this repo)
├── Updates case studies
├── Updates experiments
└── Maintains changelog
```

Weekly Process (20-30 min Fridays): 1. Query sources in Claude.ai (10 min) 2. Manual captures - Granola, chats (5 min) 3. Update portfolio in Claude Code (10-15 min)

Used for: This portfolio - systematic capture of learnings and methodologies.

How These Workflows Connect

```
Research Phase
├── Systematic Landscape Analysis (gather data)
├── Validate Each Fact Always (ensure quality)
└── Reconciling Conflicting Data (synthesize insights)
        ↓
Decision Phase
├── Two-Phase Prompting (move to action)
└── Executive Summary Framework (present recommendation)
        ↓
Documentation Phase
└── Portfolio Update Process (capture learnings)
```

Demonstrated Outcomes

Metric	Result
Research time reduction	~85% (3-4 hours vs 2-3 weeks)
Sources per analysis	50+ with citations
Project delivery	2 weeks vs typical 6-8 weeks

Metric	Result
Citation rate	100% in research outputs
Executive buy-in	Achieved on strategic recommendations

Key Differentiators

This isn't "I use ChatGPT." This is:

1. **Systematic methodologies** - Repeatable, documented processes
2. **Evidence-based outputs** - Every claim validated, every recommendation cited
3. **Measured outcomes** - Time savings, quality improvements tracked
4. **Critical thinking** - Knowing when AI helps vs. when it doesn't
5. **Knowledge capture** - Continuous documentation of learnings

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Quick Reference: When to Use What

Situation	Workflow
Need market/competitive research	Landscape Analysis
Have recommendations, need action plan	Two-Phase Prompting
Presenting to executives	Executive Summary Framework
Any research output	Validate Each Fact Always
Data sources disagree	Reconciling Conflicting Data
End of week/month	Portfolio Update Process

These workflows have been developed through 3+ months of AI-assisted product management work at WGU Labs.