PLAYBOOK

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Practical PMM Frameworks for agentic AI in the Office of the CFO

A concise guide for Series B/C teams scaling agentic AI in the Office of the CFO

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Introduction

Why Traditional Positioning Falls Short for Agentic AI

Most Product Marketing leaders today still rely on the classic positioning framework that has served SaaS and enterprise teams well for decades:

Category → Problem → Solution → Features/Benefits → Differentiation → Outcome.

It's clean. It's logical. And it works - until you're selling agentic AI in the Office of the CFO.

Because agentic systems are fundamentally different. They aren't passive tools that wait for instructions. They are autonomous actors that can plan, decide, and execute complex, multi-step workflows with minimal human input. In highly regulated finance environments, this changes everything.

Buyers (CFOs, VPs of Finance, Controllers, and AP Managers) no longer simply ask "What does it do?" They ask:

- "How can I trust it?"
- "Who is accountable if something goes wrong?"
- "How do I maintain governance and explainability?"

This shift demands that we evolve traditional positioning.

How We Got Here: A Brief Evolution of Positioning Thinking

The foundations were laid in the 1950s when David Ogilvy asked the pivotal question: "How should you position your product in the customer's mind?" Ries and Trout formalized the discipline in the 1970s-80s with their seminal book *Positioning: The Battle for Your Mind*. Geoffrey Moore adapted it for high-tech B2B in the early 1990s. David Aaker expanded it further with brand equity, the Brand Identity Model, and the Brand Relevance Framework (2011), encouraging marketers to create new subcategories where competitors become irrelevant.

From this rich foundation, modern PMM distilled the widely used linear framework we know today. **However, agentic AI requires us to go futher.**

Scope of This Playbook

This short playbook focuses on what matters most at the Series B/C stage: **positioning, buyer understanding, messaging, and enablement -** without over-promising autonomy or ignoring governance.

It primarily uses **Procure-to-Pay (P2P)** and invoice processing workflows as the core example, as these represent high-volume, exception-heavy processes where agentic AI delivers immediate impact. I have built a working proof-of-concept **Invoice Processing AI Agent Copilot** in this area through a recent intensive Agentic AI bootcamp.

To show broader applicability across the Office of the CFO, the frameworks also reference related workflows such as account reconciliation, month-end close, and anomaly detection.

The four practical frameworks that follow are designed to help PMM leaders bridge classic positioning with the new realities of agentic AI in regulated finance environments - turning powerful technical capabilities into trusted buyer stories that build confidence and accelerate pipeline.

The 3 Paths to Agentic AI Adoption in the Office of the CFO

When finance organizations evaluate agentic AI investments, they typically face three primary paths:

1. **Build (Custom DIY) -** Develop in-house or with consultants using open-source frameworks like Python and LangChain. Offers maximum control and customization, but demands significant time, talent, and ongoing maintenance.
2. **No-Code / Low-Code Platforms -** Faster deployment with less engineering overhead, striking a balance between speed and flexibility.
3. **Buy (Hyperscaler / Packaged Solutions) -** Adopt vendor platforms (e.g., Salesforce Agentforce) with usage-based or per-seat pricing. Provides speed to value but often comes with less control over data, models, and governance.

Each path involves different trade-offs in **speed**, **cost**, **control**, **governance**, **and long-term flexibility**. **This playbook is written primarily for teams evaluating or pursuing the packaged or platform route**. It equips Product Marketing leaders with frameworks to clearly articulate differentiation - especially around trust, explainability, auditability, and governance - so their solution stands out against both heavy custom builds and generic hyperscaler options.

Framework 1:

Agent-Centric Positioning Canvas

Traditional positioning works well when you're competing inside an established category. The classic flow (Category → Problem → Solution → Features/Benefits → Differentiation → Outcome) helps buyers quickly understand how your product is better than alternatives.

However, Agentic AI in the Office of the CFO changes the game. Buyers (CFOs, VP's of Finance, Controllers, AP managers) care far more about **trust, risk, control, explainability, and governance** than raw speed or cost savings.

This requires evolving traditional positioning into an Agent-Centric Positioning Canvas - a practical tool that explicitly builds governance, explainability, and human oversight into the core story from day one.

The Agent-Centric Positioning Canvas

Element	Traditional Focus	Agent-Centric Evolution (Office of the CFO)
Category	"AP Automation Tool" or "Invoice Processor"	"Agentic AI Copilot for Procure-to-Pay" or "Autonomous Invoice Processing Agent with Governance"
Problem	Manual data entry, slow processing, errors	Fragmented, error-prone P2P workflows that create bottlenecks, compliance risk, poor cash visibility, and frustrated internal teams
Solution	AI-powered invoice extraction & matching	Autonomous agent that plans, executes, and iterates multi-step P2P workflows while maintaining full audit trails and human escalation paths
Differentiation	Faster, more accurate, cheaper	Explainable decisions + built-in governance + seamless human-in-the-loop controls + integration across ERP, procurement, and banking systems
Key Risks Addressed	(Often overlooked)	Hallucinations, unauthorized actions, regulatory non-compliance, lack of auditability
Buyer Outcome	Reduced processing time & cost	Faster cash flow, stronger vendor relationships, cleaner data for decisions, reduced compliance risk, and more time for strategic finance work.

How to Use This Canvas

1. Start with the buyer's reality - Interview AP teams, Controllers, and CFOs about their biggest pain points and fears around autonomy.

2. Define the new subcategory clearly - Avoid competing as "just another automation tool." Claim a more relevant space (e.g., "The Agentic Copilot for High-Volume P2P with Enterprise Governance").

3. Make governance a feature, not an afterthought - Explicitly call out audit trails, explainability, escalation rules, and approval workflows in your positioning.

4. Test early - Share draft positioning with 3-5 target buyers and ask: "Does this feel trustworthy and relevant for our environment?"

Common Pitfall to Avoid

Over-emphasizing full autonomy ("hands-off, fully autonomous agent") without addressing how the agent stays safe and compliant. In the Office of the CFO, this almost always backfires.

Example Application

Instead of positioning your solution as "AI Invoice Processing," try:

"For finance teams drowning in manual P2P work, our Agentic Invoice Processing Copilot autonomously handles intake, matching, exception resolution, and posting - with full explainability and governed escalation - so AP teams can capture early payment discounts, strengthen vendor relationships, and free up time for strategic analysis."

Framework 2:

Buyer Persona + Jobs-to-be-Done for Agentic Workflows

Traditional buyer personas describe who the buyer is. For agentic AI, we need to go further and understand what job each persona is trying to get done - especially the functional, emotional, and social jobs in a highly regulated finance environment.

This framework combines your key Office of the CFO personas with a Jobs-to-Be-Done (JTBD) lens to uncover both their goals and their deepest fears.

Key Personas in the Office of the CFO

- CFO – Strategic Visionary & Economic Buyer
- VP of Finance – Ops Strategist & Primary Buyer
- Controller – User Champion & Technical Buyer
- AP Manager – End User & Influencer

Jobs-to-Be-Done Matrix for Agentic AI

Persona	Core Job/Goal	Key Fears & Uncertainties	Solution Requirements (What the Agent Must Deliver)
CFO	Lead C-suite AI adoption, earn board recognition as an innovator, drive long-term digital maturity and agility in volatile markets	Risk aversion, team resistance to innovation, skepticism about ROI amid cost pressures	Automate complex multi-party contracts & invoices, eliminate risk through regulatory adaptability, demonstrate clear TTV/ROI with quick wins
VP of Finance	Successfully implement and scale agentic AI, prove measurable ROI, enable growth	Security concerns, implementation complexity, team resistance	Scalable automation with strong governance, visible cost transparency, fast time-to-value
Controller	Achieve higher accuracy, ensure compliance, dramatically improve productivity	Job loss fears, system reliability, compliance risks	Reliable, explainable automation with full audit trails and appropriate human oversight
AP Manager	Simplify daily work, reduce errors, maintain team harmony	Job loss fears, poor usability, resistance to change	Intuitive, easy-to-use agent that removes repetitive tasks while keeping humans in control

How to Use This Framework

1. **Map the Job Statement**
   Use this simple format for each persona:
   "When [situation], I want to [goal] so that [outcome]."

   Example for AP Manager: "When invoices pile up every week with constant exceptions, I want to simplify processing and reduce errors so that my team can focus on higher-value work and maintain harmony."

2. **Surface Emotional & Social Jobs**
   CFOs want to be seen as innovative leaders.
   Controllers and AP Managers fear job displacement and loss of control.
   Address these directly in your positioning and messaging.

3. **Link to Positioning (Framework 1)**
   Feed these jobs and fears straight into your Agent-Centric Positioning Canvas - especially the "Key Risks Addressed" and "Buyer Outcome" rows.

4. **Practical Next Step**
   Validate these JTBD statements through 5-10 buyer interviews. The gaps between current manual processes and desired outcomes almost always reveal the strongest messaging opportunities for agentic AI.

Key Insight for Agentic AI in Finance:

The most powerful job in the Office of the CFO is often "Get reliable outcomes with minimal personal and organizational risk." Technical autonomy only becomes valuable when it is paired with strong governance, explainability, and clear human oversight.

Framework 3:

Messaging Hierarchy for Agentic Products

Once you have clear positioning and deep buyer understanding, the next critical step is building a Messaging Hierarchy that translates technical agent capabilities into trusted, buyer-focused stories.

Traditional messaging often leads with features ("Our AI does X, Y, Z"). For agentic AI in regulated finance, this approach fails. Buyers need messaging that leads with trust and outcomes while still addressing their specific jobs and fears.

The Agentic AI Messaging Hierarchy

Use this 4-level structure to create messaging that resonates with the Office of the CFO:

1. **Headline (Core Promise)**
   One clear, benefit-oriented statement that defines the new subcategory and speaks to the primary buyer's most important job.

   Example (P2P / Invoice Processing focus):
   "Autonomous Invoice Processing that executes Procure-to-Pay workflows with full transparency and control."

2. **Supporting Pillars (3 maximum)**
   Three key benefits that support the headline. Each pillar should address both functional and emotional needs while directly countering common fears.

Recommended Pillars for Agentic AI in Finance:

- **Trust & Governance**
  Every decision is explainable, fully auditable, and includes configurable human-in-the-loop controls.

- **Efficiency & Strategic Impact**
  Dramatically reduces manual work, accelerates cash flow, strengthens vendor relationships, and frees finance teams for higher-value strategic initiatives.

- **Compliance & Risk Reduction**
  Adapts automatically to regulatory changes while maintaining defensible records and minimizing compliance risk.

3. **Proof Points & Evidence**
Concrete support for each pillar (use metrics, capabilities, or early results).

Examples:

- "Reduces invoice processing time by up to 80% while maintaining 100% audit visibility."
- "Configurable escalation rules ensure humans stay in control of exceptions and high-value decisions."
- "Built-in regulatory adaptability reduces risk of non-compliance penalties."

4. **Call-to-Action / Next Step**
Clear, low-friction invitation tailored to the buyer's stage (e.g., "See the agent in action on your invoices" or "Book a 30-minute governance review").

How to Adapt Messaging by Persona (Using Framework 2)

Persona	Primary Focus of Messaging	Recommended Tone & Emphasis
CFO	Innovation, long-term agility, board-level impact	Visionary, strategic, ROI-focused
VP of Finance	Implementation success, scalability, measurable ROI	Practical, results-oriented, risk-mitigated
Controller	Accuracy, compliance, productivity	Reliable, defensible, control-oriented
AP Manager	Simplified daily work, reduced errors	Empathetic, ease-of-use, team-friendly

Practical Tips for Building Effective Messaging

- Lead with trust, not autonomy.
  - In finance, "autonomous" without governance triggers fear.
- Test messaging with real buyers from each persona.
  - What feels credible vs. overhyped?
- Create modular assets:
  - One core deck + persona-specific versions (CFO board deck vs. AP team enablement).
- Avoid common pitfalls:
  - Don't promise "fully hands-off" agents.
  - Instead, emphasize "autonomous where safe, human-controlled where it matters."

Key Insight:

The winning messaging for agentic AI doesn't sell technology - it sells confidence. Buyers in the Office of the CFO will only embrace agentic systems when they believe the agent will deliver reliable outcomes without increasing their personal or organizational risk.

Framework 4:

GTM Enablement & Launch Tactics for Agentic AI

Positioning, buyer understanding, and messaging are only valuable if they actually reach the sales team and customers in a usable way. Framework 4 focuses on turning your strategy into executable GTM assets that help Series B/C companies launch and scale agentic AI successfully in the Office of the CFO.

The 90-Day PMM Enablement & Launch Roadmap

Use this practical timeline to drive momentum at the Series B/C stage:

Weeks 1–4: Foundation & Discovery

- Conduct buyer interviews using the JTBD framework (Framework 2)
- Finalize Agent-Centric Positioning (Framework 1)
- Build and test core Messaging Hierarchy (Framework 3)
- Identify quick-win use cases (start with high-volume P2P/invoice processing)

Weeks 5–8: Asset Creation & Enablement

- **Develop core sales assets:**
    - Battlecards that directly address fears (job loss, reliability, compliance risk)
    - Demo scripts showing the agent handling real exceptions with clear escalation paths
    - ROI / Time-to-Value calculator focused on cash flow improvement and cost transparency
    - One-pager comparing "Traditional Automation" vs. "Agentic AI Copilot"
- **Create internal enablement:**
    - Sales training deck with real buyer objections and how to respond
    - Internal playbook for Customer Success on governance and change management

Weeks 9–12: Launch & Iteration

- Support product launch with targeted content (LinkedIn posts, customer stories, webinar on "Governance-First Agentic AI for Finance")
- Run pilot programs with 2–3 early customers (ideally starting in invoice processing)
- Gather feedback and refine messaging based on actual usage and objections
- Measure success: pipeline influence, win rate on agentic deals, sales team confidence scores

Essential GTM Assets for Agentic AI

1. **Battlecards**
   - Objection: “What if the agent makes a mistake?”
     Answer: “Every decision includes full audit trail + configurable escalation rules. Humans retain final control on high-risk items.”

2. **Demo Framework**
   - Show three scenarios: Happy path, exception handling, and governance override.

3. **ROI Story**
   - Combine hard metrics (processing time saved, early payment discounts captured) with soft benefits (team time freed for strategic work, reduced compliance risk).

4. **Change Management Narrative**
   - Frame the agent as a “team member” that removes drudgery, not a replacement. Emphasize upskilling opportunities.

Key Success Factors at Series B/C Stage

- Don’t over-promise autonomy - Position the agent as “autonomous where safe, guided where it matters.”

- Make governance visible - Turn explainability and audit trails into a competitive advantage, not a checkbox.

- Start narrow, then expand - Begin with one high-impact workflow (e.g., invoice processing) to generate quick wins and build internal confidence before scaling to reconciliation or month-end close.

- Measure what matters - Track not just usage metrics, but influence on pipeline, sales cycle length, and win rate.

Final Insight:

At the Series B/C stage, great PMMs don’t just create messaging - they own the bridge between product, sales, and customer success. The companies that win with agentic AI will be those whose GTM teams can confidently say:

“Our agents deliver real outcomes safely, with full transparency and control.”

Conclusion & Next Steps

The shift to agentic AI represents one of the most significant changes in finance operations in decades. Traditional positioning frameworks served us well for tools and platforms, but agentic systems - autonomous actors that plan, decide, and execute complex workflows - require a more evolved approach.The four frameworks in this playbook provide a practical system to meet this moment:

- Framework 1 helps you build trust-first positioning that accounts for governance and explainability from the start.
- Framework 2 ensures you deeply understand the real jobs, goals, and fears of CFOs, VPs of Finance, Controllers, and AP Managers.
- Framework 3 translates technical capabilities into clear, confidence-building messaging hierarchies.
- Framework 4 turns strategy into executable GTM assets and a realistic 90-day launch plan.

By applying these frameworks, PMM leaders at Series B/C companies can move beyond low-risk back-office automation and help their organizations turn agentic AI into a genuine competitive advantage - stronger vendor relationships, improved cash flow, reduced compliance risk, and more time for strategic work.

The window of opportunity is now. Teams that cling only to safe, incremental automation risk being commoditized, while those willing to thoughtfully redesign core Office of the CFO processes with proper governance will create lasting differentiation.

Next Steps - Your 30-Day Action Plan

1. This Week: Review your current positioning using the Agent-Centric Positioning Canvas (Framework 1).
2. Next 7 Days: Map your key buyer personas and Jobs-to-Be-Done using Framework 2. Validate with at least 3–5 stakeholder conversations.
3. Days 8–14: Build and test your Messaging Hierarchy (Framework 3) with internal sales and product teams.
4. Days 15–30: Prioritize your top 3 enablement assets and create a lightweight 90-day launch roadmap (Framework 4).

Start small. Pick one high-impact workflow - such as Procure-to-Pay and invoice processing - generate early wins, then expand.

I’d be happy to walk through any of these frameworks with you or adapt them to your specific agentic use cases. Feel free to reach out for a 15-minute conversation.

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