

RoleSpec: From AI Curiosity to AI Usage

A role-specific spec library that helps professionals turn their real work into AI-ready workflows — solving the step before the tool.

MGA - Group 12



Everyone Has AI Tabs Open. Very Few Have AI Doing Real Work.

The Intent

Professionals open ChatGPT, Claude, and Copilot daily. Motivation is not the problem. Curiosity is high.

The Execution Gap

When it is time to make AI do real work, they stop. The tab stays open. The Monday task stays manual.

The Wrong Diagnosis

✗ The Myth

Users need more tutorials, better templates, or a simpler tool interface to get started with AI.

✓ The Reality

Users need role-specific problem framing — a way to describe their own work in machine-actionable terms.

Solving for tool complexity misses the upstream gap entirely. The block is not the tool — it is the step before the tool.

The Real Bottleneck: Problem Formulation



Trigger: Unknown

Steps: Undefined

Output: Missing

The step before the tool is broken. Users know their work — but they cannot decompose it into trigger, steps, output, and edge cases that AI tools can act on.



Built From Real Research

18

Interviews

In-depth conversations with tech and
tech-adjacent professionals

29

Survey Responses

Structured survey capturing workflow and
AI usage patterns

8

Days of Research

April 28 – May 5, 2026

User Research Report: [Phase 1 Submission Doc](#) — contains interview excerpts, survey structure, raw insight notes, and synthesis behind RoleSpec product decisions.

Insight 1: Peer Proof Activates. Content Only Informs.

Passive Mode

A YouTube tutorial or template gallery informs the user. They watch, nod, and return to their manual workflow unchanged.

Active Mode

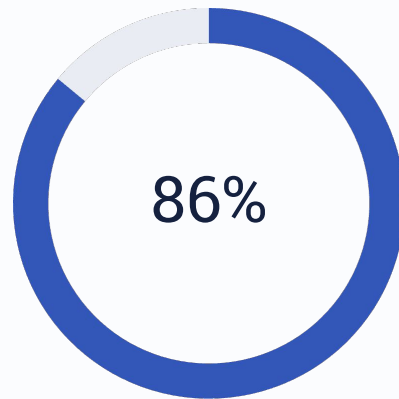
A spec from someone in the same role and org type creates recognition – and recognition creates action. The closer the match, the more likely the user moves.

Insight 2: The Block Is Upstream of Every Tool



Could Not Spec Unprompted

Users could not produce a usable automation or workflow spec without guidance



Stall Before the Canvas

Users stall upstream of Zapier, Make, n8n, and Lovable – not inside them

The problem is not that tools like Zapier are too complex. The problem is that users cannot describe their work as trigger → steps → output before they ever open the tool.

The capable stranded professional: capable at the job, stranded at low AI usage

The same archetype across Sales, Ops, Product, and Marketing. We start with Sales for V1.

THE ARCHETYPE · THREE OBSERVED SIGNALS

01 STRENGTH



Established at the job

Hits targets. Closes deals. Delivers output. Not entry-level — this is the meat of the org.

02 GAP



Stuck at chat-mode AI

Uses ChatGPT for one-off emails. Aware of the AI shift. Most workflows still manual.

03 ROOT CAUSE



No spec to operationalize

Cannot describe own work as trigger → steps → output. Block is upstream of every tool.

LONG-TERM SCOPE · EVERY STRANDED ROLE

Sales AE

Ops Analyst

Product Manager

Marketing Manager

+ many more

V1 WEDGE · SALES

Ranked #1 for AI impact . Tight feedback loop — the workflow either ships or it doesn't.

Sales AEs lose 45 minutes per discovery call to manual prep across 4 tools

Sarah Chen, Sales AE at a Series B SaaS company

ARCHETYPE



Sarah Chen

Sales AE · SaaS, Series B

MONDAY, 8:47 AM

Discovery call with Acme in 13 minutes.
She has not started prep.



*I just open Salesforce and start scrolling.
There's no system.*

WHERE THE 45 MINUTES GO

 **45 minutes**

per call · self-reported avg

	Salesforce — Last interactions, deal stage	12 min
	Slack — Thread search for past commitments	9 min
	Email + LinkedIn — Contact context	11 min
	Crunchbase — Funding, news, headcount	7 min
	Note synthesis — Pulling it all together	6 min

IMPLICATION

**This is not a tool gap.
It is a workflow gap.**

Sarah uses each of these tools every day. What she lacks is a repeatable workflow that combines them.

AEs unblock the moment they see their workflow written by a peer in the same role

The unlock is not the tool — it's the recognition.

SC

Sarah, alone with the blank canvas

WITHOUT PEER REFERENCE

6 months. Same loop.

🔍 Tries ChatGPT — gets a generic prep checklist

⚡ Tries Zapier — sees the blank canvas, leaves

📄 Watches a tutorial — nothing changes Monday

🔄 Returns to 45-min manual prep before every call

Outcome: No spec. No automation. Still manual.



MR

**Maria's spec — Sales AE, Series B SaaS,
Salesforce + Slack**

WITH PEER-MATCHED SPEC

12 minutes to a working draft.

Pre-call account brief

+2.5h/wk

Sales AE · SaaS Series B · Salesforce + Slack

Trigger 30 min before 'Sales Call' event

Steps Salesforce → Slack → News → compile

Output One-page brief to AE's Slack DM

Three hypotheses tested — only role-matched peer specs activate adoption

Each hypothesis evaluated against in-depth interviews and structured survey responses.

METHODOLOGY

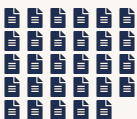
Interviews

n = 18 · 60 min each



Surveys

n = 29 · structured



Hypothesis

Research finding

Verdict

**Content & tutorials
activate AI usage**

Users watched tutorials and template galleries, nodded, and returned to manual workflows. Information transfer did not change behavior.

✗ Rejected

**Simpler tools
remove the block**

Users could not produce a usable workflow spec before opening Zapier or Make. The block is upstream of the tool interface.

✗ Rejected

**Role-matched peer specs
activate adoption**

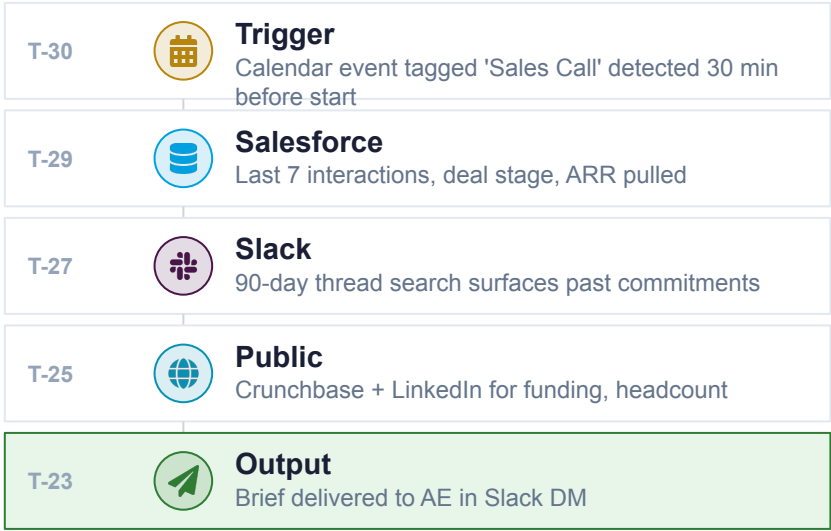
Users who saw a peer's spec in their exact role and stack produced their own adapted version in under 12 minutes, unprompted.

✓ Supported

The pre-call account brief automates 45 minutes of prep into a 7-minute workflow

V1 hero spec for Sales AEs: calendar-triggered, runs across Salesforce, Slack, and public sources.

HOW THE AUTOMATION RUNS



WHAT LANDS IN SLACK

RoleSpec Bot
 8:37 AM · in #sarah-prep

Account brief: Acme Corp

Discovery call at 9:00 AM with Michael Torres, VP Sales

COMPANY

SaaS · Series B · \$18M raised Oct 2024 · Growing 25% QoQ

LAST CONTACT

May 3: Discovery call. Michael interested in Q3 POC.

NEWS

✓ Acme expanded to EMEA (May 2026). Hiring UK + DE.

OPEN WITH

Congrats on EMEA. Must be moving fast on enablement.

OUTCOME 45 min manual prep → 7 min automated workflow. AE walks into the 9 AM call prepared.

Live walkthrough: RoleSpec prototype

Three moments to watch: role-matched browse, contextual adapt, pre-filled export.

The image displays three sequential screenshots of the RoleSpec prototype interface, each within a browser window titled 'spec2.netlify.app'.

01 Role-matched browse

Buttons: Sales AE, SaaS

- Pre-call account brief** +2.5h
Sales AE · Salesforce
- Sequence reply alert** +1.5h
Sales AE · Salesforce
- Stalled deal radar** +2h
Sales AE · Salesforce

Validates · Peer matching

02 Two-question adapt

Your CRM?

Pipedrive ✓

Brief delivered to?

Email ✓

✓ Adapted: Pipedrive → Email

Validates · Decomposition bypass

03 Pre-filled export

Zapier deep-link →
Open in Zapier, ready to build

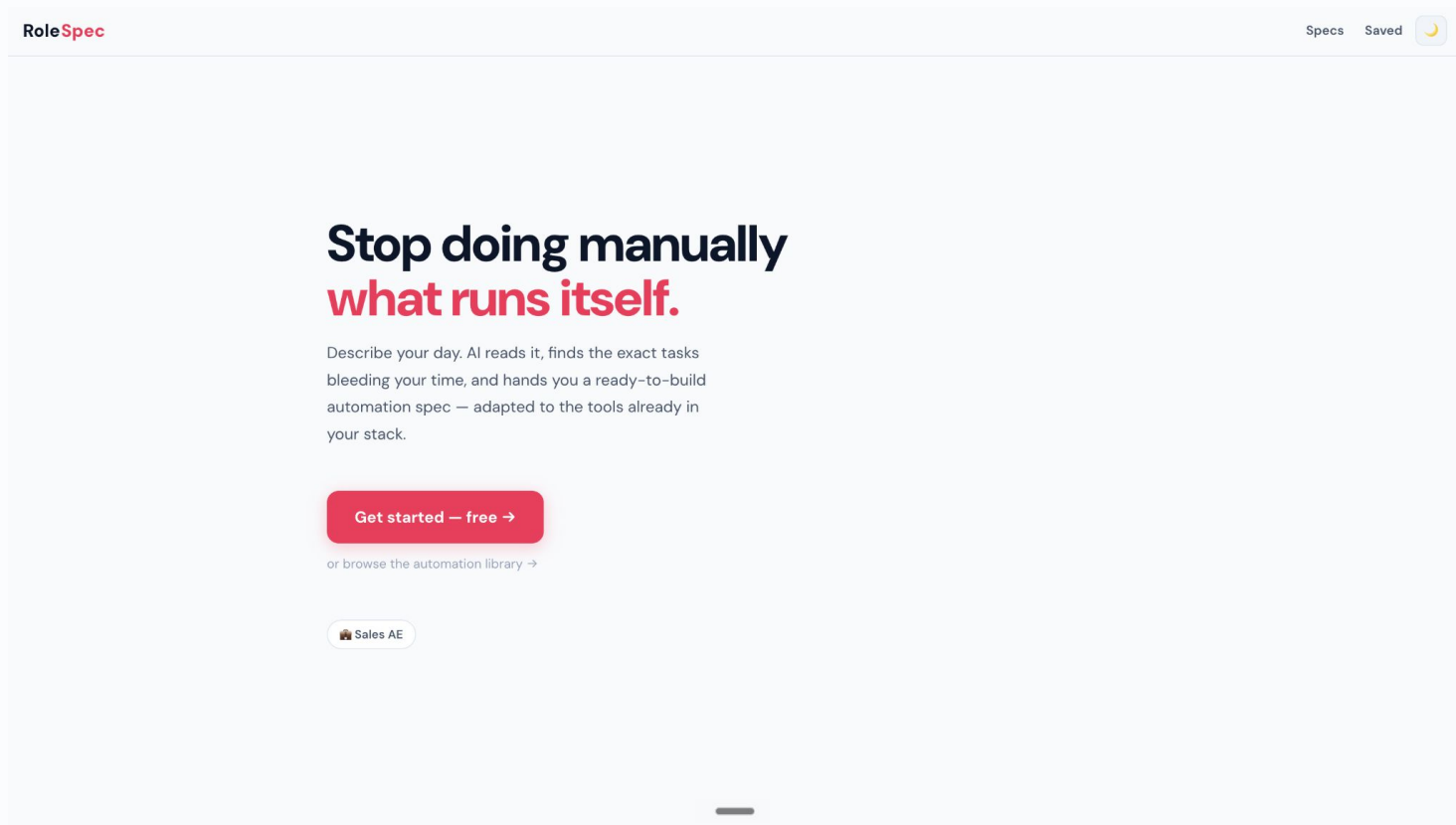
Plain text spec
Copy + paste

Portfolio card
Share to LinkedIn

Validates · Export-to-build

V1 Prototype Walkthrough Starts

[Click here for the working prototype](#)



Onboarding: Two Fields Create the Matching Gate

RoleSpec

SpecsPricingContribute🌙Pro ₹299 →

YOUR ROLE

 Sales AE ✓

+ Other role

YOUR TOOLS — tap what you use

SalesforceHubSpotLinkedInOutreachGongZoomInfoGmailSlackApollo

SalesloftClariChorus6senseGoogle CalendarNotionLoomZoomMicrosoft Teams

ClayInstantlyLemlistPipedriveCloseCopper

+ Add a tool not listed

YOUR WORKDAY

AI reads this to find *your specific* manual tasks — not generic ones. The more specific you are, the smarter the output.

 Record

e.g. I spend time on outreach prep, CRM updates, call briefs, follow-ups, pipeline reviews...

Show me specs →

Skip — browse all 12 specs

Why It Matters

Matching on role *and* tool usage — not generic templates — is what makes peer specs feel close enough to activate. Generic matching produces generic results.

Spec Library: Browse Specs From People Like You

Sales AE

[Change](#)

12 specs · sorted by tool match

All

 Sales

Matching your stack:

Outreach

Google Calendar

Search 12 specs...

All

Hot pick

Trending

5-minute AI meeting brief delivered before every sales call

+2.5h/wk

 Sales AE · 1 tool match

Hot pick

Salesforce

✓ Google Calendar

Slack

⌕ 30 minutes before any calendar event tagged 'Sales Call', 'Discovery', or 'Demo'

Sequence reply detection → immediate rep alert

+1.5h/wk

 Sales AE · 1 tool match

Hot pick

✓ Outreach

Salesforce

Slack

⌕ Prospect replies to any active Outreach sequence

Hyper-personalised outreach from LinkedIn + CRM in 90 seconds

+3h/wk

 Sales AE

Hot pick

LinkedIn

HubSpot

Gmail

⌕ New lead added to CRM with LinkedIn URL

Task

What workflow the spec covers

Time Saved

Estimated hours recovered per week

Tools

Zapier, Make, n8n, or other

Spec Detail: Every Spec Is Structured as Trigger → Steps → Output → Edge Cases

[← Back](#)

5-minute AI meeting brief delivered before every sales call

Sales AE

+2.5 hrs/wk

Hot pick

Salesforce

✓ Google Calendar

Slack

✓ 1 of your tools match — adaptation will be fast

TRIGGER

30 minutes before any calendar event tagged 'Sales Call', 'Discovery', or 'Demo'

STEPS

1. Pull attendees and company from calendar invite
2. Query CRM: deal stage, last activity date, open tasks, ARR, industry, competitor field, last 3 notes
3. Fetch company news from last 14 days: funding rounds, product launches, leadership hires or departures
4. Generate brief: company snapshot, deal status, 3 sharp talking points tuned to current deal stage, likely objections and counters
5. Deliver via Slack DM 30 min before the call: 'Prep for [Company] in 30 min 📌'

OUTPUT

FORMAT

Slack DM

DESTINATION

Slack

RECIPIENT

Rep

► Edge cases (3)

Make it mine →

Annotated Structure

- **Trigger:** What starts the workflow
- **Steps:** Ordered, discrete actions
- **Output:** What the tool produces
- **Edge Cases:** Exceptions and fallbacks

Make It Mine: Two Questions Adapt the Spec to Your Context

Make it yours

2 questions. AI does the rest.

STEP 1 OF 2

Which tools do you use for this? (select all that apply)

Gong

Salesforce

HubSpot

LinkedIn

Outreach

Gong

ZoomInfo

Gmail

Slack

Apollo

Next →

Q1

What tool do you use for this step in your org?

Make it yours

2 questions. AI does the rest.

STEP 2 OF 2

Where should the output land? (select all that apply)

Salesforce + Slack

Slack

Gmail

Notion

Google Sheets

Teams

HubSpot

Salesforce

Email

Linear

← Back

Adapt spec →

Q2

Who receives or acts on this output?

Adapted Spec & Export: The Spec Becomes Theirs Before They Open the Tool

← Adapt again

This automation will save the Sales AE an average of 2.5 hours per week by providing a concise and actionable meeting brief before every sales call, allowing them to focus on high-value activities like closing deals and building relationships.

✓ I personalised the spec to use Outreach and 6sense as the primary tools for sales data and company insights, and HubSpot for notifications, to match the user's tool stack and workflow.

5-minute AI meeting brief delivered before every sales call

TRIGGER

30 minutes before any Google Calendar event tagged 'Sales Call', 'Discovery', or 'Demo'

STEPS

1. Pull attendees and company from Google Calendar invite
2. Query Outreach and 6sense: deal stage, last activity date, open tasks, ARR, industry, competitor field, last 3 notes
3. Fetch company news from last 14 days: funding rounds, product launches, leadership hires or departures using 6sense
4. Generate brief: company snapshot, deal status, 3 sharp talking points tuned to current deal stage, likely objections and counters
5. Deliver via HubSpot notification 30 min before the call: 'Prep for [Company] in 30 min'

OUTPUT

FORMAT

Notification

DESTINATION

HubSpot

RECIPIENT

Sales AE

EDGE CASES

- Internal calls (same domain): detect and skip entirely
- Outreach account not found: brief uses public info only — flag for rep to create record
- Recurring weekly syncs: only run brief if Outreach shows activity since last occurrence
- 6sense company data not found: use Google search results as fallback

EXPORT

Set up automation →
Pre-file your trigger

Copy LinkedIn post
Share what you built

Save to my library
Add to your collection

Download JSON
For n8n / Make

Export n8n workflow
Import into n8n

Build this with a peer

COMING IN V2

A Sales AE who has already built this automation walks you through it live in 7 days. We're matchmaking for the first cohort.

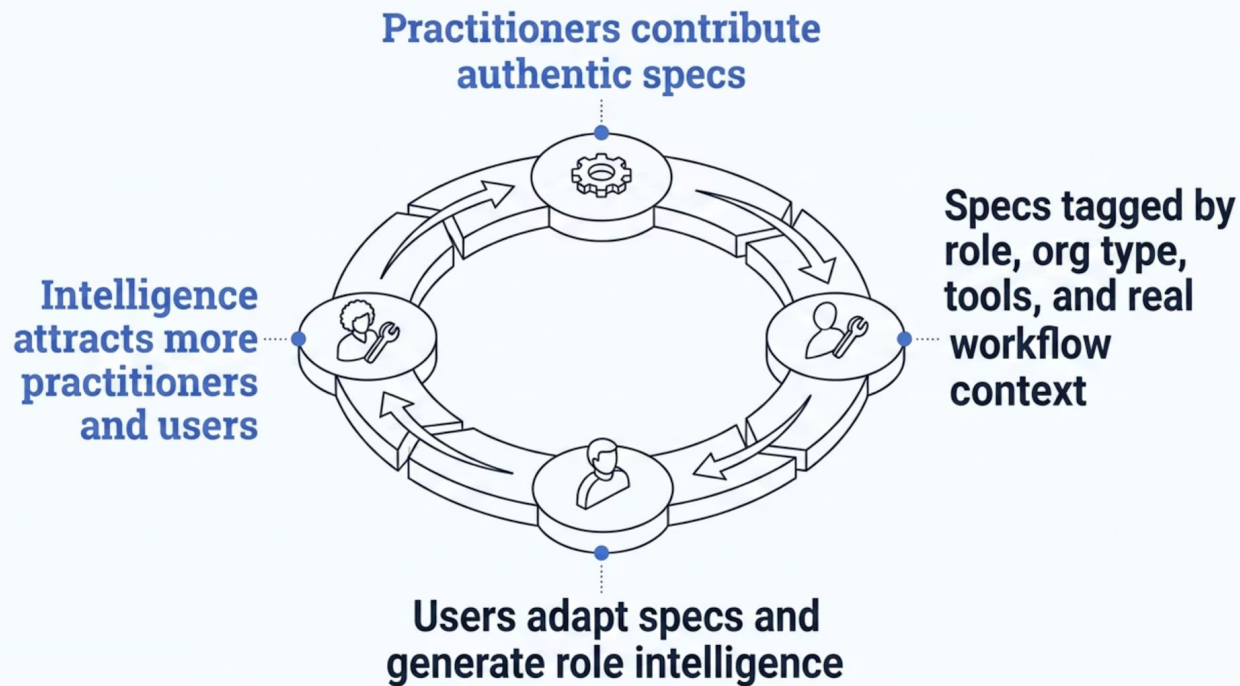
Same role 7 days By application

Join the waitlist →

- Zapier deep-link
- Plain text spec
- JSON for builders
- Portfolio card

Inline token editing lets users finalize the spec before leaving RoleSpec.

The Practitioner Network Is the Growth Loop



A generic AI-generated template gallery can be copied overnight. A practitioner network tagged by role, org type, tools, and real workflow context is much harder to replicate. Authenticity and role context are the supply-side moat.

V1 Scope & Business Model

V1 Roadmap

01

P0 — Ship the Path

Onboarding, library, spec detail, Make It Mine, token edits, magic link, export

02

P1 — Grow the Network

ShipSprint waitlist, contribution form, saved specs

Paywall After Value Is Proven (Planned for future)

- **Free:** Browse, full spec, first adaptation, Zapier deep-link
- **Starter:** Unlimited adaptations, JSON/templates, portfolio card
- **ShipSprint:** Guided build with practitioner support

The Bet: Role-Matched Specs Turn AI Curiosity Into AI Usage

Four Validation Tests

- Decomposition bypass — can users skip blank-spec paralysis?
- AI adaptation quality — does the adapted spec feel accurate?
- Export to build — do users open the tool after export?
- Willingness to pay — do users upgrade after first adaptation?

The Closing Statement

If role-matched specs create recognition, and recognition drives exports, the path from AI curiosity to AI usage is confirmed: **role-specific problem formulation**.

RoleSpec solves the step before the tool.

