

Build Your Brand Personas with Claude

Turn your real customer data into living personas
that stay relevant, current, and actionable

Shopify data

Customer reviews

Survey data

Klaviyo

Brand guidelines

WHO

Why Personas Still Matter — More Than Ever

A persona is a portrait of a real type of customer — built from real data, given a name and a voice, so your whole team can think about them as a person rather than a demographic. When you know who you're talking to, every piece of content, every ad, every email gets sharper.

Most brands built their personas once — years ago, from a survey, from gut feel, or from a workshop with a consultant. Those personas are still pinned to the wall. They're outdated. They don't reflect who's actually buying today, what language those customers use, or what's driving their decisions right now.

This is where Claude changes everything. Building personas used to take weeks — research, synthesis, workshops, templates. With Claude and your real customer data, you can build five living, data-driven personas in a single afternoon. And because it's fast, you can *update them*. Run them quarterly. Rebuild them after a product launch. Refresh them when your customer mix shifts.

■ *The brands winning today aren't the ones with the best creative — they're the ones who understand their customer most precisely. Personas are how you get there.*

What good personas unlock

Without personas	With data-driven personas
Writing copy for 'everyone' — which resonates with no one	Writing copy for a specific person — which resonates deeply
Ad targeting based on demographics alone	Ad targeting shaped by psychographics, language, and behavior
Guessing what customers care about	Knowing their actual motivations from their own words
One brand voice for all channels	Tone that shifts based on which persona you're speaking to
Personas built once, never updated	Personas refreshed with new data whenever your customer mix shifts

Five personas as your foundation

Five is the right number to start. Too few and you miss important segments. Too many and they become unwieldy — your team stops using them. Five personas gives you enough coverage to represent the

meaningful diversity in your customer base without creating a document nobody reads.

Each persona should feel distinct — different motivation, different relationship with your product, different language. If two personas feel similar, merge them. If a major customer type isn't represented, add one.

The Data You'll Feed Claude

The quality of your personas is directly proportional to the quality and breadth of data you bring. Claude is a synthesis engine — it finds patterns across sources that would take a human analyst days to connect. The more data you give it, the more nuanced and accurate your personas become.

Don't wait until you have every data source. Start with what you have. A persona built from three good sources beats waiting six months for a perfect data set. You can always layer in additional sources and ask Claude to refine.

Shopify Customer Export	Shopify
<p>What it tells you: Who's buying — location, purchase frequency, average order value, first vs repeat buyers, what products they buy together, how long between purchases.</p> <p>Why it matters: This is your behavioral foundation. It separates what customers say they do from what they actually do. High AOV customers often cluster into a distinct persona from one-time buyers — the data shows you where those lines are.</p>	
Shopify Orders Data	Shopify
<p>What it tells you: Product-level purchase patterns — which SKUs sell together, seasonal buying behavior, which products lead to repeat purchases, which are one-and-done.</p> <p>Why it matters: Order data reveals intent. A customer who buys your entry-level product then upgrades three months later is a different persona than someone who buys your premium line first. The journey is in the orders.</p>	
Klaviyo Email Data	Any brand
<p>What it tells you: Engagement patterns — which segments open, which campaigns convert, what content drives clicks, unsubscribe triggers, which flows perform by segment.</p> <p>Why it matters: Email behavior reveals what customers actually care about vs what they ignore. A persona who engages with educational content is fundamentally different from one who only opens promotional emails. Klaviyo shows you the split.</p>	

Customer Reviews & UGC

Any brand

What it tells you: The exact language customers use to describe your product, what problems it solved, what surprised them, what they tell their friends.

Why it matters: This is gold. Reviews are customers explaining their own persona to you — unprompted, unfiltered, in their own words. The phrases that appear repeatedly across reviews are the ones that should appear in your persona voice sections.

Customer Surveys

Any brand

What it tells you: Motivations, lifestyle context, how they found you, what almost stopped them from buying, what they wish you made, how they'd describe you to a friend.

Why it matters: Surveys capture the why behind the what. Combined with behavioral data, they let Claude connect motivation to action — understanding not just that a segment buys frequently, but why they keep coming back.

Brand Guidelines / Brand Markdown File

Any brand

What it tells you: Your brand's voice, values, positioning, audience intent, and the language you've already established as on-brand.

Why it matters: Including your brand guidelines ensures personas are built within your brand's frame of reference. Claude will calibrate the persona language and archetypes to feel like they belong to your brand — not a generic template.

■ *Export tip: From Shopify, go to Customers → Export (CSV). For orders, go to Orders → Export. From Klaviyo, export your segments and campaign performance. Copy-paste reviews directly from your product pages or review platform. Survey data can be pasted as raw responses or summary — both work.*

How to Build Your Personas with Claude

The process has three phases: prepare your data, run the analysis, then refine until each persona feels like a real person you'd recognize. Plan for about two to three hours the first time — most of that is gathering and formatting your data, not the actual Claude session.

1 Prepare your data

Gather and format before you open Claude

Before starting a Claude session, pull together everything you have. You don't need to clean it up perfectly — Claude handles messy data well. But having it all ready before you start means you won't lose momentum mid-session.

- Export your Shopify customer and orders CSV files
- Export Klaviyo segment data and top campaign performance
- Copy 30–50 of your best (and worst) customer reviews into a doc
- Gather any survey responses — raw or summarized
- Have your brand guidelines or brand markdown file ready to paste

■ *You don't need all five sources to start. If you only have reviews and Shopify data, that's enough to build a first draft. Add more sources later to deepen and refine. A rough persona today beats a perfect persona never.*

2 Set the stage

Give Claude full context before asking for personas

Don't jump straight to 'build me personas.' Start by giving Claude everything it needs to understand your brand and customers. Paste your data sources one at a time, or all together if the session can hold it. Then set your brief.

■ PROMPT — Copy and paste into Claude

I want to build 5 customer personas for my brand using real customer data.

Here is everything I'm going to give you – please read all of it carefully before building anything:

1. My brand guidelines: [paste your brand.md or brand overview]
2. Shopify customer data summary: [paste CSV data or key stats – total customers, AOV, repeat rate, top locations, top products]
3. Shopify orders data: [paste order patterns, top SKUs, bundles]
4. Klaviyo data: [paste segment sizes, top performing campaigns, open rates by segment, flow performance]
5. Customer reviews: [paste 30-50 reviews – include both positive and critical ones]
6. Survey responses: [paste survey data or summary]

Once you've read all of this, confirm what patterns you're seeing before we build the personas. I want to make sure you've absorbed the data, not just processed it.

3

Build the personas

Ask Claude to synthesize into five distinct profiles

Once Claude has confirmed it has absorbed the data and shared its initial observations, ask it to build the five personas. The key instruction is specificity — you want each persona to feel like a real person, not a marketing archetype.

■ PROMPT — Copy and paste into Claude

Based on everything you've read, please build 5 customer personas.

For each persona, include:

- A name (first name only – make it feel real, not corporate)
- A one-line archetype (e.g. 'The Weekend Warrior', 'The Deliberate Researcher')
- A tagline – one sentence that captures their relationship with our brand
- Age range and key lifestyle context
- What drives their purchase decision (their actual motivation)
- What they're afraid of or want to avoid (their friction)
- How they found us and what made them buy
- The data signals that point to this persona existing
(which reviews, which behaviors, which survey answers)
- A direct quote in their voice – how they'd describe our product
to a friend, using language from the actual reviews

Make each persona feel genuinely distinct. If two feel similar, merge them and create a different fifth persona instead.

Ground every claim in the data – no invented traits.

4

Pressure test them

Push Claude to defend and sharpen each persona

Once you have a first draft, don't accept it immediately. The best personas come from pushing back — asking Claude to defend its choices, identify where it's uncertain, and stress-test the distinctions between personas.

■ PROMPT — Copy and paste into Claude

Before I accept these, I want to pressure test them. Please:

1. For each persona, tell me: which specific data points most strongly support this persona existing? What would I look for in my data to confirm they're real?

2. Where are you least confident? Which persona has the weakest data support — and what additional data would strengthen it?

3. Are personas 2 and 4 truly distinct? Walk me through what makes them genuinely different customers, not just variations of the same type.
[replace 2 and 4 with any pair that feel similar]

4. What's the most surprising thing the data revealed about our customers that isn't reflected in our current marketing?

5

Make them usable

Format for your team and add to your brand file

Raw persona output from Claude is useful — but formatted personas that your whole team can quickly reference are what actually change how people work. Ask Claude to produce a clean, shareable version, then add it to your brand markdown file so it's available in every future Claude session.

■ PROMPT — Copy and paste into Claude

Please reformat all 5 personas into a clean markdown document I can share with my team and add to my brand guidelines file.

Format each persona as:

```
## Persona [N]: [Name] – [Archetype]
```

```
> [Tagline]
```

```
**Who they are:** [2-3 sentences]
```

```
**What drives them:** [motivation in 1-2 sentences]
```

```
**What they avoid:** [friction in 1-2 sentences]
```

```
**In their own words:** '[direct quote]'
```

```
**Data signals:** [bullet list of supporting evidence]
```

```
---
```

At the end, add a section called 'How to use these personas' with

3-4 sentences on how the team should apply them to content and campaigns.

What Your Personas Might Look Like

The following are example personas for a hypothetical outdoor gear brand — shown here to illustrate the format and depth Claude will produce. Your personas will be grounded in your actual customer data and will sound like your specific customers, not these placeholders.

Pers ona 1	Marcus	<i>Gear-driven, experience-hungry</i>
<i>“The Weekend Warrior”</i>		
What the data shows		
<ul style="list-style-type: none">• High AOV, buys premium SKUs — rarely looks at sale items• Reviews mention 'worth every penny' and 'best I've owned'• Repeat purchaser — buys new category after mastering the last• Engages with product education emails, ignores promotional ones• Survey: 'I research for weeks before I buy anything'		
How they talk:	<i>“I don't buy cheap gear twice. I'd rather spend once on something that lasts than replace budget stuff every season.”</i>	

Pers
ona 2

Priya

Research-first, trust-driven

“The Considered Converter”

What the data shows

- Long time-to-purchase — multiple site visits before buying
- Reviews mention 'finally pulled the trigger' and 'glad I waited'
- High email open rate — reads comparison and how-to content
- Survey: 'I needed to see real people using it before I bought'
- Often buys after seeing UGC or review content, not ads

**How they
talk:**

“I read every review before I buy anything. Once I trust a brand, I'm loyal — but you have to earn it first.”

Pers
ona 3

Jake

*Occasion-driven,
outcome-focused*

“The Gift Buyer”

What the data shows

- Single purchase, Q4 spike, buys mid-tier products
- Reviews mention 'bought this as a gift' frequently
- Low email engagement post-purchase — not building a relationship
- Survey: 'I wanted something they'd actually use, not just look cool'
- High return rate if product doesn't match gift expectation

**How they
talk:**

“I needed something that looked impressive but was actually practical. My brother lives outside — it had to be real gear.”

Pers
ona 4

Dana

*Experience-led,
comfort-first*

“The Comfort Seeker”

What the data shows

- Buys sleep and comfort category first, then expands
- Reviews emphasize 'sleep quality' and 'woke up feeling rested'
- Responds to lifestyle imagery — highest CTR on cozy/restful content
- Survey: 'I love the outdoors but I'm not roughing it'
- Repeat buyer — upgrades within category as trust grows

**How they
talk:**

“I want the full outdoor experience without sacrificing sleep. If I'm exhausted the next day, the trip wasn't worth it.”

Pers
ona 5

Sam

Identity-driven, brand-loyal

“The Community Member”

What the data shows

- Highest LTV segment — buys across multiple categories
- Leaves detailed reviews, tags brand on social, refers friends
- Survey: 'This brand gets my lifestyle — I tell everyone about it'
- Engages with every email type — promotional, educational, community
- First to buy new products — often before reviews exist

**How they
talk:**

“This isn't just gear, it's part of how I think about being outside. I've converted three of my friends already.”

Keep Your Personas Current

The single biggest advantage of building personas with Claude is how fast you can update them. Traditional persona work was so time-intensive that brands only did it every few years. With Claude, you can refresh quarterly — which means your personas actually reflect who's buying from you today.

When to refresh	What triggers it	What to update
Quarterly	New season, new campaign cycle	Re-run with latest Shopify and review data
After a product launch	New SKU changes your customer mix	Check if a new persona has emerged
After a big campaign	Significant new customer acquisition	Do new customers fit existing personas?
When copy stops working	Declining CTR, rising CPAs	Persona language may have drifted from reality
Annually	Full brand review	Rebuild from scratch with a full year of data

■ PROMPT — Copy and paste into Claude

It's been [X months] since I built my brand personas. I want to refresh them with updated data.

Here are my original 5 personas: [paste existing persona markdown]

Here is my updated data since the last refresh:

- New Shopify customer/orders data: [paste]
- New reviews since [date]: [paste]
- New survey responses: [paste]
- Any notable changes: [e.g. 'we launched a new product line', 'we ran a major sale', 'we expanded to a new audience']

Please:

1. Tell me what has changed in our customer base since the last refresh
2. Identify which personas are still accurate vs which need updating
3. Flag if any new persona type has emerged that isn't covered
4. Produce an updated set of personas with changes clearly noted

Guide created 2026 | Whiskey & Pack | whiskeyandpack.com | Built with Claude AI