

The Sarah Prompt Kit

The buyer role-play workflow Luan Wise ran live in Claude, as a reusable prompt sequence for any B2B persona · The AI Social Playbook

What this is, and what it isn't. Prompts 1 to 6 follow the sequence Luan ran on the recording. Their wording comes from the prompts she pasted on screen, taken from her prep notes, with her cybersecurity example turned into variables. Prompts 7 and 8 were not run on the recording: prompt 7 is the next step in her notes, and prompt 8 is the stakeholder switch she and Mike discussed. Both are tagged below. Prompt 9 is written from what Luan described between 15:31 and 16:20, and prompt 10 is her confidence check from 17:29. Claude's replies differ between runs, so your persona will not answer in the same words Sarah did. A role-played persona is a simulation built from your inputs and the model's training data. It gives you hypotheses to check against real customers, not findings.

01 Technical Stack

TOOL	ROLE IN THE WORKFLOW	NOTES
Claude	Plays the persona and the marketing lead in a single chat, switching seats on instruction.	claude.ai. Luan ran the demo in Claude and said the free version is enough. No model or paid feature was needed.
Your existing customer research	The source for the persona briefing. Interviews, sales call notes, reviews, support tickets, win and loss notes.	Required. Luan's first rule: do not ask the AI to invent the persona from a blank page.
Avatar template (optional)	An existing persona card or one-page format for Claude to complete at the end.	Mentioned at 15:31. Any template your team already uses.
Claude Project (optional)	Stores the finished avatar document so later chats can reuse it.	Suggested by Mike at 16:47, not demonstrated. Any saved workspace in another AI tool works the same way.

02 Configuration

Prepare all three before opening a chat.

Persona briefing

A short written brief in three parts: the business, the person, and what existing customers have told you. Use the template at the start of section 04. Every line should come from your research. If a line is a guess, label it as a guess or leave it out.

Scenario paragraph

Two or three sentences describing what you sell, in plain language, from the provider's side. In the demo: a cybersecurity provider that monitors a company's systems 24/7, identifies threats and protects the business without it needing its own specialist.

One chat per persona

Run the whole sequence in one conversation so the marketing lead can read everything the persona said. Restate the role every time you switch seats. Luan does this because the tool "tries to draw on memory" sometimes, and sometimes the wrong memory."

03 Flowchart Map

1	Write the persona briefing IN Your customer research → OUT A three-part briefing using the template
2	Seed the interview PROMPT 1 IN Briefing plus scenario paragraph → OUT Claude in character as the persona, under interview rules
3	Ask the broad opening question PROMPT 2 IN One open question about the business and priorities → OUT Where your category ranks, plus any assumption the persona reveals
4	Chase the assumption, then score confidence PROMPT 3 IN The assumption from stage 3 → OUT Whether they have checked it, and a 1 to 10 confidence score with reasons
5	Switch to the marketing lead and debrief PROMPT 4 IN The interview so far → OUT A list of what the role-play says about the persona
6	Back to the persona: the next action PROMPT 5 IN One action the persona would have to take, such as raising it with their current provider → OUT Likelihood, timing, and what makes the action uncomfortable
7	Switch again: turn it into marketing activity PROMPT 6 IN The next-action answer → OUT Content types, tone and language guidance for the campaign
8	Put a real message in front of the persona PROMPT 7 (not run on air) IN A headline, landing page or email draft → OUT First reaction, trust signals, objections, reasons to leave

9

Move to a second stakeholder seat **PROMPT 8** (not run on air)

IN The other decision-maker named in the briefing → OUT The approval questions that person would ask

10

Package the avatar for the team **PROMPT 9**

IN The full thread, plus your avatar template if you have one → OUT A one-pager or crib sheet for sales, in the persona's language

Use the confidence check (prompt 10) at any stage where an answer seems too neat.

04 System Prompts

Copy each panel whole. Replace every highlighted variable before running. Run prompts 1 to 9 in order, in one chat.

TEMPLATE

FILL IN FIRST

Persona Briefing

WHAT WE KNOW ABOUT [PERSONA NAME] BEFORE USING AI

Business

- [COMPANY SIZE AND TYPE]
- [LOCATION]
- [STAGE: e.g. established, growing, limited internal resources]

The person

- [ROLE / TITLE]
- [WHAT THEY ARE AND ARE NOT EXPERT IN]
- [THEIR ROLE IN THE PURCHASE DECISION]
- [PRESSURES: e.g. time-poor, responsible for risk]

What existing customers have told us

- [FINDING FROM RESEARCH 1]
- [FINDING FROM RESEARCH 2]
- [FINDING FROM RESEARCH 3]
- [ADD AS MANY AS YOUR RESEARCH SUPPORTS]

PROMPT 1

COPY WHOLE

Seed the Persona Interview

You are [PERSONA NAME], [ROLE / TITLE] of a [COMPANY SIZE AND TYPE] based in [LOCATION]. Based on our existing customer research, people like [PERSONA NAME] tend to be concerned about [TOP CONCERNS FROM YOUR RESEARCH]. They are not [DOMAIN] experts and can find technical terminology off-putting. [OTHER DECISION-MAKER] is also involved in approving significant expenditure and will have questions about [THEIR CONCERNS].

Scenario: [SCENARIO PARAGRAPH]

I want to interview [PERSONA NAME]. Stay in character and answer from their perspective. Don't give me generic marketing advice. If something is uncertain, say so.

PROMPT 2

COPY WHOLE

Broad Opening Question

[PERSONA NAME], tell me about your business and your biggest priorities at the moment.

PROMPT 3

SEND AS TWO MESSAGES

Chase the Assumption, Then Score Confidence

You've said [ASSUMPTION THE PERSONA JUST REVEALED]. Have you [ASKED / CHECKED THIS DIRECTLY]?

--- send the next line after the persona replies ---

Do you feel confident that [THE OUTCOME YOU PROTECT OR DELIVER] right now? Scale of 1 (low) to 10 (high).

PROMPT 4

COPY WHOLE

Switch Seats: Persona Debrief

Now, switch position. You are the marketing lead for [YOUR COMPANY TYPE]. What has this role-play told us so far about our persona?

PROMPT 5

SEND AS TWO MESSAGES

Back to the Persona: The Next Action

Back to your role as [PERSONA NAME]. Given this conversation, how likely are you now to [NEXT ACTION, e.g. ask your current provider about X]?

--- optional follow-up, from Luan's notes ---

If [CURRENT PROVIDER OR SOLUTION] says they don't have you covered, what might you do next?

PROMPT 6

COPY WHOLE

Switch Seats: Marketing Activity

Now, switch position again. You are the marketing lead for [YOUR COMPANY TYPE]. What can we learn from this response to guide our marketing activity?

PROMPT 7

NOT RUN ON AIR

Put Your Marketing in Front of the Persona

Back to your role as [PERSONA NAME]. Here is [A HEADLINE / A LANDING PAGE / AN EMAIL] from a [YOUR COMPANY TYPE]:

[PASTE YOUR COPY]

What's your immediate reaction to this?

--- then dig deeper, one question per message ---

What does "[KEY PHRASE FROM YOUR COPY]" mean to you?

Does this make you want to find out more?

What questions would you have?

What would make you trust this company?

What would make you leave the website?

--- for an email or sequence (described at 16:20) ---

What objections might you have? How many emails would it take, knowing this isn't a top priority for you?

PROMPT 8

NOT RUN ON AIR

Second Stakeholder Seat

Now you've answered my questions as [PERSONA NAME]. I want you to switch perspective. You're [PERSONA NAME]'s [OTHER DECISION-MAKER]. You've been asked to approve this purchase. What questions would you ask?

PROMPT 9

COPY WHOLE

Package the Avatar for the Team

Using everything [PERSONA NAME] has said in this conversation, complete the attached avatar template: [ATTACH OR PASTE YOUR TEMPLATE]

Then create a one-page crib sheet of bullet notes for our sales team: what matters to [PERSONA NAME], what worries them, and the words they use, in their language. Mark anything that came from our briefing rather than from the interview.

PROMPT 10

USE AT ANY STAGE

Confidence Check

How confident are you about that answer? Give me a percentage.

--- if the percentage is low ---

What could we do to make you more confident of that?

05 Variable Callouts

Worked examples are Luan's cybersecurity persona from the episode.

VARIABLE	WHAT IT IS	WORKED EXAMPLE
[PERSONA NAME]	A first name for the buyer you are simulating	Sarah
[ROLE / TITLE]	Their position in the business	Owner
[COMPANY SIZE AND TYPE]	Headcount and what the business does	15-person professional services business
[LOCATION]	Country or region, which shapes language and norms	The UK
[TOP CONCERNS FROM YOUR RESEARCH]	What your real customers worried about before buying	Whether they need it, whether their IT provider already covers it, the cost, and what would happen in an attack
[DOMAIN]	The specialist field your product sits in	Cybersecurity
[OTHER DECISION-MAKER]	Anyone else who approves or influences the purchase	Finance Director
[THEIR CONCERNS]	What that second person will ask about	Cost, risk and value
[SCENARIO PARAGRAPH]	What you sell, from the provider's side, in plain language	A provider that monitors systems 24/7, identifies threats and protects the business without it needing its own specialist
[ASSUMPTION THE PERSONA JUST REVEALED]	Something the persona takes for granted in their last answer	You use an IT provider
[ASKED / CHECKED THIS DIRECTLY]	The direct check they have not made	Asked them about cybersecurity

[THE OUTCOME YOU PROTECT OR DELIVER]	The result your product is responsible for	Your business is protected
[YOUR COMPANY TYPE]	The kind of company running the campaign	A cybersecurity provider
[NEXT ACTION]	A step the persona would have to take, ideally one involving their current provider	Ask your IT provider about cybersecurity
[CURRENT PROVIDER OR SOLUTION]	Whoever the persona relies on today	Your IT provider
[PASTE YOUR COPY]	The message you want to test	Protect your business from cyber threats with 24/7 managed cybersecurity.
[KEY PHRASE FROM YOUR COPY]	The phrase most likely to be jargon to this buyer	Managed cybersecurity
[ATTACH OR PASTE YOUR TEMPLATE]	Your team's existing persona card, if you have one	Name, photo, role, goals, worries, channels

06 Human Quality Control

Three checks before any finding goes into a brief or a campaign.

Check 1. Every finding in the debrief traces to something the persona said in this chat, not to a line in your own briefing.

CATCHES Your assumptions echoed back as insight. In the demo, the debrief drew on Luan's original scenario as well as the interview. It raised the Finance Director, who never came up in Sarah's answers, and Luan pointed that out on air. Anything that only appears in your briefing is not new evidence.

Check 2. Run the interview a second time in a fresh chat and keep only the findings that appear both times.

CATCHES One run's phrasing mistaken for a pattern. Luan's rehearsal and her live run produced different wording and the same overall picture. The overall picture is what you use. A single memorable quote is not.

Check 3. Next to each finding, name the real customer conversation, sales call or data that would confirm or kill it before the campaign ships.

CATCHES A simulated persona treated as validated research. "We can't take at face value what an AI tool is giving us," Luan said. The role-play tells you what to ask real buyers. It does not tell you what they will say.