Carousel Creative

VIP Research Framework

The starting point for creative strategy that truly resonates.

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INTRODUCTION

Start Here

Most ad creative underperforms for one reason: it was built on assumptions instead of evidence.

The VIP Research Framework is a three-step process for building a deep, evidence-based picture of your customer — one that is grounded in their actual words, organised into meaningful insights, and synthesised into personas you can use to brief and build creative that connects.

VIP stands for Voice, Insight, Persona. The order is intentional. You collect raw customer language first. You extract meaning from it second. You build your personas last — once the evidence underneath them is solid. Skipping steps or running them out of order is how you end up with personas that feel like fiction.

What makes this framework different from a typical research exercise is the infrastructure behind it. Each step feeds into the next through a connected Airtable database, so you can always trace a persona back to an insight, and trace that insight back to a real customer quote. Your creative decisions stop being gut calls and start being defensible.

This document walks you through each step, including how to use AI tools to do the heavy lifting, and where to keep a close human eye on the work.

THE FRAMEWORK

The VIP Process at a Glance

V	I	P
Voice	**Insight**	**Persona**
Collect raw customer language from real sources, word for word.	Extract structured insights: pain points, jobs to be done, triggers, objections, alternatives, and more.	Synthesise insights into evidence-based customer personas.

Each layer is connected. Personas are built from insights. Insights are built from quotes. Everything traces back to real customer data, and that traceability is what makes your creative strategy defensible.

Setting Up Your Airtable Base

Before you begin, set up your research infrastructure. The three-step process works best when all three layers live in a single connected Airtable base, so you can link quotes to the insights they generated, and insights to the personas they inform. Use the master setup prompt on the next page to have your AI build this for you.

A NOTE ON MCP

MCP (Model Context Protocol) is a way to connect an AI tool like Claude directly to external apps — including Airtable — so it can read from and write to your database without you copying and pasting anything manually. If you have Claude's Airtable MCP connector set up, your AI can log quotes, generate insights, and link everything together automatically. If you don't have MCP set up yet, you can still follow this process — just paste your AI's output into Airtable yourself after reviewing it at each step.

AIRTABLE SETUP

Master Setup Prompt

Paste the prompt below into Claude or ChatGPT to set up your three-table Airtable base. Do this before you begin any research.

MASTER SETUP PROMPT

Paste into Claude or ChatGPT:

I am setting up a customer research database in Airtable to support a three-step research process called VIP: Voice, Insight, Persona. Please help me set up a base with three linked tables.

Table 1: Voice (Customer Quotes)

Fields: Quote ID (autonumber), Source Type (single select: Reddit / Product Review / Competitor Review / YouTube Comments / Forum / Survey / Interview / Sales Call / DM / Other), Source URL (URL), Source Date (date: when the quote was originally written or said), Speaker Handle (text: username or respondent name), Exact Quote (long text), Context (long text), Speaker (single select: Customer / Prospect / Non-customer / Unknown), Subject (single select: This brand / Competitor / Category), Wording Verified (checkbox), Tags (multiple select, leave blank for now)

Table 2: Insights

Fields: Insight ID (autonumber), Insight Type (single select: Pain Point / Job to Be Done / Trigger / Objection / Alternative / Use Case / Psychographic / Demographic), Insight Summary (text), Detail (long text), Supporting Quotes (linked records → Voice table), Quote Count (count of linked Supporting Quotes), Reviewed (checkbox)

Table 3: Personas

Fields: Persona ID (autonumber), Persona Name (text), Psychographic Summary (long text), Values and Priorities (long text), Pain Points Summary (long text), Primary Emotional Motivators (long text), Awareness Stage (single select: Problem-unaware / Problem-aware / Solution-aware / Product-aware / Most-aware), Purchase Trigger (long text), Secondary Demographics (long text: age range, life stage, occupation — only if genuinely relevant), Key Insights (linked records → Insights table), Notes (long text), Reviewed (checkbox)

Please walk me through creating this base step by step, including how to set up the linked record fields between tables.

STEP 01

Voice

Voice is the raw material of the entire framework. In this step, you collect real customer language — exactly as it was written or spoken — from every place your customer talks about their problems, their lives, and products like yours. The goal is not to summarise or interpret yet. The goal is to capture the data as close to its original form as possible, so that every insight and persona you build later can be traced back to something a real person actually said.

Where to collect it

- Reddit threads and subreddits where your customer hangs out
- Product reviews on your client's website
- Competitor product reviews
- YouTube comments on relevant videos
- Forums and communities for your category
- Surveys, interviews, DMs, and sales calls the client has already collected
- Any other first-party customer research the client has access to

Run Voice in multiple passes

Don't run a single search and call it done. Run Voice in three passes, each aimed at a different kind of person. Together they give you both the specific and the generic.

Pass 1: The category. People who are considering a product in your client's category, whether or not they've heard of your client. This is where you find what people look for, what they compare, and what they're afraid of getting wrong. These are your broader, more generic insights.

Pass 2: The problem. People talking about the problems your product solves, without necessarily thinking about a product at all. This is where you find the raw pain, the workarounds, and the language people use before they know a solution exists.

Pass 3: The brand. People talking specifically about your client's product, by name. This is where you find what actually made people buy, what made them hesitate, and how real customers describe the product in their own words. These are your most specific insights.

Passes 1 and 2 tell you what the market feels. Pass 3 tells you how your client is landing inside it. You need all three, and you'll use the Subject field (This brand / Competitor / Category) to keep them separate in your database.

How to collect it

For each source, look for quotes that reveal how the customer thinks about their problem, what they have tried, what frustrated them, what they were hoping for, and what changed when they found a solution.

For Reddit specifically: use ChatGPT rather than Claude, as ChatGPT currently has better access to Reddit content. For product reviews and other web-based sources, either tool works well.

When you ask your AI to collect quotes, always ask it to structure the output as a table with these columns: Date · Username or Respondent · Exact Quote · Context · Source URL. The exact quote column should be word for word, with no paraphrasing.

Keep the data clean

Record the date. Fill in Source Date with when the quote was originally said or published. A years-old forum post and a review from last week look identical without it, and the market moves.

One person, one record. Log the username or respondent name for every quote. If the same person says three useful things, that is still one voice, not three. Otherwise one loud commenter can look like a pattern.

HUMAN-IN-THE-LOOP

AI tools are not guaranteed to reproduce quotes exactly. A quote that has been paraphrased or subtly changed may be an AI's rendering rather than what the person actually wrote. Check a sample against the original source before saving anything to your database, and tick Wording Verified only once you have confirmed the exact wording. Never lift a quote into creative until Wording Verified is ticked. If a quote has been changed, correct it or discard it. And add what the AI missed — if you know the customer, you'll often spot language, worries, or sources it overlooked. The value of this step depends entirely on the accuracy of the language you capture.

STEP 1A PROMPT — COLLECTING VOICE DATA

Paste into your AI of choice (use ChatGPT for Reddit). Run once per pass, changing the focus line:

I am collecting voice of customer data for [product/brand] to use in ad creative strategy research. I need you to find and pull customer quotes from [source — e.g. Reddit / product reviews at this URL / etc.].

This pass focuses on: [Pass 1: people considering a product in the [category] category / Pass 2: people talking about [the problem the product solves] / Pass 3: people talking specifically about [brand name] by name].

Please pull quotes that reveal how customers talk about: their problems or frustrations, what they were looking for, what they tried before, what made them choose or not choose a product, and what changed after they found a solution.

Format your output as a table with these columns: Date | Username or Respondent | Exact Quote (word for word, do not paraphrase) | Context (brief note on what they were responding to) | Source URL

Pull as many relevant quotes as you can find. Do not summarise or interpret. Just capture the raw language.

Before moving on: Review the output carefully. Check a sample of quotes against the original source. Correct or remove anything paraphrased. Once satisfied, use the prompt below to log the reviewed quotes to your Airtable Voice table.

Tagging who is talking, and what they're talking about

Two fields make your quotes far more useful at the Insight step. Your AI fills these in when logging to Airtable — you review and correct as needed.

Speaker is who is talking, relative to the brand.

- Customer: they have bought it, so the quote can carry testimonial weight.
- Prospect: they considered it and either didn't buy or the outcome is unknown. Prospects carry the objections that matter most.
- Non-customer: they're in the market but weren't weighing your client.
- Unknown: you can't verify from the source. Don't guess.

Subject is what the quote is actually about: your client's product (This brand), a named rival (Competitor), or the category in general (Category). These two tags are independent — a customer can talk about the category, and a non-customer can talk about your brand.

STEP 1B PROMPT — LOGGING TO AIRTABLE

Paste into your AI of choice once you have reviewed the quote output from Step 1A:

I have a table of reviewed customer quotes for [product/brand]. I need you to log each one to the Voice table in my Airtable base [base name], adding two tags per quote as you go.

Here is the quote table: [paste your reviewed quote table here]

For each quote, fill in these fields:

Speaker (who is talking relative to the brand): Customer — they have bought this product / Prospect — they considered it but outcome is unknown / Non-customer — in the market but not weighing this brand / Unknown — can't verify, do not guess

Subject (what the quote is about): This brand — talking specifically about [brand name] / Competitor — talking about a named rival / Category — talking about the product category in general

Also fill in: Source Date, Speaker Handle, Exact Quote, Context, Source URL, and leave Wording Verified unchecked. I will tick that myself after spot-checking.

If you do not have MCP connected to Airtable, output the full table with all columns including Speaker and Subject so I can paste it in manually.

When is Voice complete? Aim to pull from at least three to four distinct sources, and to have run all three passes, before moving on. You want enough data that patterns start to emerge — the same frustrations and phrases coming up repeatedly across different sources. Do not move to the Insight step until the Voice table feels genuinely comprehensive.

STEP 02

Insight

Insight is where raw data becomes strategic intelligence. In this step, you review all of the quotes you have collected and extract structured insights: the pain points, jobs to be done, triggers, objections, alternatives, use cases, and psychographics that your creative strategy will be built on.

The critical requirement of this step is traceability. Every insight should be linked back to the specific quotes that support it. This is what makes the framework defensible — you can always show where an insight came from, and you can always go back and challenge it if new data suggests something different.

The insight types

Categorising each insight by type is what makes the insight layer useful for creative strategy. You want to be able to quickly pull all triggers, or all objections, when you're building creative later.

Pain Point

Something about the customer's situation that is frustrating, costly, or worrying. Pain points can be functional (the current option doesn't work as it should), emotional (it makes them feel embarrassed, overwhelmed, or stuck), or situational (a recurring circumstance creates the problem).

Job to Be Done

The progress the customer is trying to make in their life — the "job" they hire a product to do. Based on Clayton Christensen's Jobs to Be Done framework.

Trigger

The specific moment, event, or change in circumstances that moves someone from vaguely aware to actively searching. Knowing the common triggers means your creative can meet people at the exact point they're ready to buy.

Objection

A reason they hesitate, doubt, or choose not to buy.

Alternative

What the customer was doing before this product: a DIY workaround, a product from a different category, or nothing at all. Alternatives are not the same as competitors. Understanding the alternative tells you what you are really up against.

Use Case

A concrete scenario in which the product gets used. A single customer usually has many use cases: different reasons, on different days, in different environments. A library of specific scenarios is often more useful for creative than an abstract audience description.

Psychographic

What this person believes, values, fears, or wants to become.

Demographic

Age, life stage, occupation, and similar facts. Capture them when they genuinely matter, but they are the least useful type for creative.

How to do it

With your Voice table populated and reviewed, ask your AI to review all of the quotes together and extract insights. If you have MCP connected, your AI can read directly from Airtable and write the insights back in — linking each to its supporting quotes automatically. Without MCP, export or copy your quotes and paste them into your AI conversation.

How strong is an insight?

Don't ask the AI to rate its own confidence. Instead, look at how many separate quotes support the insight — your Quote Count field shows this automatically. Then look at who said them: an insight backed by several customers and prospects across different sources is stronger than one backed by a single enthusiastic reviewer. An insight with only one quote can still be worth keeping if it is a particularly sharp observation, but treat it as a lead, not a finding.

HUMAN-IN-THE-LOOP

This step requires more human judgment than Step 1. The AI will surface patterns, but it will not always get the categorisation right, and it may combine things that should be separate or separate things that belong together. Review every insight before it goes into your database. Add, remove, reword, and recategorise as needed. Add what the AI missed — especially objections and triggers you know from your own experience with this customer. Guide the AI if the first pass misses something. You may need a back-and-forth before the insight layer feels complete.

STEP 2 PROMPT — EXTRACTING INSIGHTS

Use with MCP connected to Airtable, or paste your quotes in manually:

I have a database of customer quotes collected from [sources]. I need you to review all of the quotes and extract structured insights from them.

For each insight, provide: Insight Type (choose one: Pain Point / Job to Be Done / Trigger / Objection / Alternative / Use Case / Psychographic / Demographic) · Insight Summary (one clear sentence) · Detail (a short paragraph explaining the insight and what it means for creative strategy) · Supporting Quotes (list the Quote IDs from the Voice table that support this insight)

Look for patterns across quotes. An insight should appear more than once, or represent a particularly sharp observation. Do not create insights that are not supported by at least one specific quote. Where possible, note whether the supporting quotes come from customers, prospects, or non-customers. Format your output as a table.

Before saving: Review every insight. Check that the supporting quotes actually support the insight as written. Reword anything that feels like an AI interpretation rather than something grounded in the actual language. Remove duplicates. Add anything the AI missed that you know from your own experience working with this customer.

When is Insight complete? Before moving to Persona, the insight layer should genuinely reflect what you know about this customer. If insights feel thin, go back and collect more quotes. Do not move forward until the insight layer feels thorough and true. Your personas are only as strong as the insights beneath them.

STEP 03

Persona

Persona is where everything comes together. Using the full body of insights you have built, you now create customer personas — rich, psychographic-led profiles of the distinct types of people who buy this product.

A persona is not a demographic description. Age, gender, and income are useful context, but they are not what makes a persona useful for creative strategy. What matters is how this person thinks, what they value, what they are trying to become, and what motivates them at a psychological level. That is what allows you to build creative that feels personal rather than generic.

Because your personas are built from the insight layer — which is built from the quote layer — every persona is grounded in real evidence. This is what separates VIP personas from the kind of fictional marketing avatars that get made up in a conference room.

How many personas

It depends on how many genuinely distinct types of customer you find, but most brands land between three and six. Fewer than three often means you are collapsing distinct customer types into one. More than six usually means the differences between personas become too small to be creatively useful. If two personas feel very similar, merge them.

Awareness stage and purchase trigger

Two fields turn a persona from a description into something you can write for.

Awareness stage is how much this person already knows when they first meet your brand: Problem-unaware, Problem-aware, Solution-aware, Product-aware, or Most-aware. A message that works for someone who already knows your product will fall flat on someone who doesn't yet know they have a problem.

Purchase trigger is the moment, feeling, or message that turns consideration into action for this persona. Draw it from your Trigger insights.

Emotional Motivators

Each persona should include its primary emotional motivators — the underlying psychological drivers behind why this type of person buys. This section draws from Will Leach's framework in Marketing to Mindstates, which identifies nine core motivational states that drive consumer decision-making. Identify the two to three motivators most active for each persona in the context of this specific product.

Achievement	The drive to accomplish something meaningful and feel a sense of progress
Autonomy	The need to feel in control and make independent choices
Belonging	The desire to feel connected to and accepted by others
Competence	The need to feel skilled, knowledgeable, and capable in what you do
Empowerment	The desire to feel strong and capable of taking on challenges
Engagement	The drive to feel stimulated, absorbed, and fully present
Esteem	The need to feel respected, valued, and seen positively by others
Nurturance	The desire to support others' growth and wellbeing
Security	The motivation to protect oneself or loved ones from harm or uncertainty

STEP 3 PROMPT — BUILDING PERSONAS

Use with MCP connected to Airtable, or paste your insights in manually:

I have a completed insight database built from customer research for [product/brand]. I need you to review all of the insights and build customer personas from them.

Please create between three and six distinct personas, depending on how many genuinely different types of customer the insights support. For each persona provide: Persona Name (short descriptive name) · Psychographic Summary (most important: how they think, what they value, who they see themselves as or want to become) · Values and Priorities · Key Pain Points (with Insight IDs) · Primary Emotional Motivators (choose two or three from: Achievement / Autonomy / Belonging / Competence / Empowerment / Engagement / Esteem / Nurturance / Security, and explain briefly why each applies) · Awareness Stage (Problem-unaware / Problem-aware / Solution-aware / Product-aware / Most-aware) · Purchase Trigger (the moment or message that tips them into buying, with Insight IDs) · What they need to hear (one or two sentences on the core message this persona needs to believe to convert) · Secondary Demographics (age range, life stage, occupation — only if genuinely relevant, keep it brief) · Key Insights linked (list Insight IDs)

Each persona should be meaningfully distinct. If two feel very similar, consider merging them.

HUMAN-IN-THE-LOOP

Review each persona carefully. Does the psychographic summary feel specific and real, or generic? Are the emotional motivators a genuine fit? Add what the AI missed — whether that is a worry, a belief, or a customer type you know exists but the data didn't surface. Adjust, rewrite, and push back as needed. The persona is only as good as the human judgment applied to it.

CONCLUSION

What You Now Have

When all three steps are complete, you have something most brands and agencies do not have: a customer research system where every creative decision can be traced back to evidence.

Your personas are not invented. They are synthesised from insights. Your insights are not assumed. They are extracted from real customer language. And your customer language is not paraphrased. It is captured word for word from the places your customer actually speaks.

This is what makes creative strategy defensible, and it is what makes the creative itself more likely to connect. When a hook feels true to the person reading it, that is not an accident. It is the result of the work you did here.

Use the VIP Research Framework at the start of every new client engagement, and revisit it whenever a campaign is underperforming and you are not sure why. The answer is almost always in the data. You just need a system for finding it.

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