

The background of the entire page is a close-up photograph of two hands. The left hand, wearing a gold ring, holds a dark pen. The right hand is positioned as if about to write on a white document. A dark teal rectangular box is centered over the image, containing the title and subtitle in white text.

THE

# Modern Marketing Playbook

---

A Human-Centered  
GTM Framework

**To&From**



# Welcome

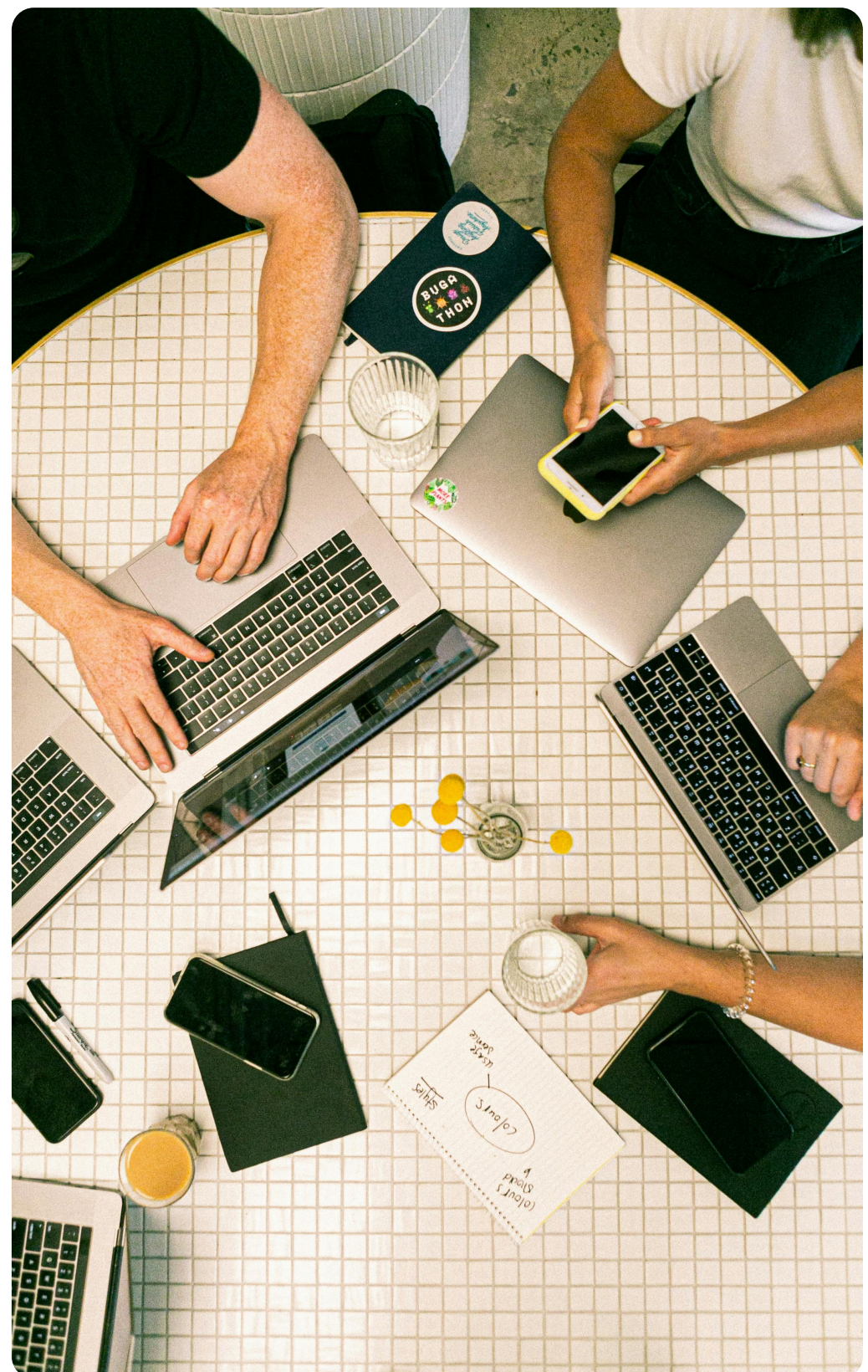
## *to The Modern Marketing Playbook: A Human-Centered GTM Framework*

This book is crafted as a comprehensive, step-by-step guide to launching effective and modern B2B marketing campaigns that not only capture attention but also drive meaningful conversions at scale.

Drawing from real customer insights, it provides actionable strategies that are tailored to the evolving demands of today's business landscape.

Each section includes a why, what and how and is structured to build momentum, ensuring that you can develop a cohesive marketing strategy that grows over time.

Whether you're looking to fine-tune your messaging, optimize your campaigns for better engagement, or scale your efforts, this book serves as a practical framework designed to help you consistently connect with your target audience and achieve measurable success. With proven methods and expert advice, it's more than just a marketing book—it's a roadmap for creating campaigns that resonate, deliver results, and evolve with your business.





# Table of contents

- 3 **STEP 1**  
Ground messaging in  
real-world insights
- 5 **STEP 2**  
Turn messaging into  
persona-driven emails
- 7 **STEP 3**  
Use direct mail to reinforce  
the message
- 9 **STEP 4**  
Host events to deepen  
& scale relationships
- 11 Summary
- 12 Additional resources



# Ground messaging in real-world insights

## WHY IT MATTERS

Effective marketing begins by listening. Before you write a line of copy or send a single email, get in the room (virtually or physically) with your market. Listening to your target audience, gathering feedback, and truly understanding their needs, challenges, and desires will give you the insights necessary to create marketing that truly resonates.

## TO THINK ABOUT

- 1 “What’s the cost of one wrong decision?”
- 2 “Be the leader who brings clarity to chaos.”
- 3 “AI starts with clean, connected data.”





## Ground messaging in real-world insights

# What to do



### Host a Founders + Customers Session

Gather 8–10 ideal customers or prospects for a candid, recorded conversation. Invite both champions and skeptics. Focus on pain points, dreams, and how they describe their challenges.



### Extract the Language That Moves

Pull exact phrases, emotional triggers, and a-ha moments from the conversation. These should shape your messaging pillars, subject lines, and campaign copy.



### Build Core Messaging Around Important Pillars

*The real friction:* messy data, siloed teams, unclear next steps.

*The emotional upside:* speed, clarity, recognition.

*The opportunity:* AI and automation can only be as good as the foundation you build.



### *To&From Pro Tip:*

Everything that follows—email, mailers, events—should echo this voice and insight. This is your throughline.



# Turn messaging into persona-driven emails

## WHY IT MATTERS

Email is a scalable marketing channel, but its full potential is only realized when it feels personal, relevant, and urgent. Generic emails get ignored, so tailoring content to the recipient's needs and adding urgency through time-sensitive offers or exclusive content boosts engagement. This combination transforms email into a powerful tool that drives conversions, nurtures relationships, and scales effectively.

## WHAT TO DO

1

**Segment by Persona**

Build sequences tailored specifically to challenges of each buyer (e.g., ops, real estate, data, strategy).

2

**Lead with Pain, not Product**

Use the insights from step 1 to write subject lines and openers that hit hard and hit home. Aim for: "I've said that exact thing in a meeting before."

3

**Offer a Human Touch**

Mix gift-based and peer-to-peer approaches. Show respect for their time and expertise.



# Examples



## GIFT EMAIL

**To:** Prospective Client



**Subject:** Still stitching store data across teams?

**Body:** We would love to hear how you're organizing your data across various teams—and we will send you a \$50 gift card for your time.

**To:** Prospective Client



**Subject:** What leaders are doing with AI + ops right now

**Body:** Our CEO is meeting with a few select peers to share what's actually working. Want in?



## PEER-LED EMAIL



### *To&From Pro Tip:*

Use the exact language from your listening session in subject lines. “Un-silo,” “fog of data,” “Hero to CEO,” whatever resonates with you.



# Use direct mail & gifting to reinforce the message

## WHY IT MATTERS

Digital channels are saturated with constant notifications, ads, and messages, making it difficult for any one piece of content to stand out. In this crowded environment, a thoughtful piece of physical mail (anything from a postcard to a personally curated gift) cuts through the noise. It's something tangible that your recipient can hold, feel, and interact with, creating a more memorable and personal experience.

## WHAT TO DO

1

### **Send Simple, Clever Mailers First**

Think postcard, mini booklet, or teaser—something that makes the pain real and invites a conversation.

Keep the text minimal in the beginning, you just want to grasp attention.



2

### **Trigger a Follow-up Gift After Engagement**

Once a meeting is booked or a conversation started, send something delightful and on-theme.



## Use direct mail to reinforce the message

# Examples

Include trigger language in insert to connect gift to your solution.



**“No more fog.”**

Blue-light glasses + screen wipes



**“As organized as your store data should be.”**

Cord organizer + journal  
from Leatherology



**“Good ideas grow in clear space.”**

Mini zen garden from Lula's Garden



### *To&From Pro Tip:*

Reinforce the message from your emails and insights.  
Surprise and delight, but stay on theme.



# Host events to deepen & scale relationships

## WHY IT MATTERS

In-person or virtual events are powerful tools for building trust because they create opportunities for authentic connection. Unlike traditional marketing channels where the focus is often on your pitch, events allow your audience to learn from peers, share experiences, and engage in meaningful conversations. This peer-to-peer learning fosters credibility and trust, as attendees gain insights and validation from others in similar situations rather than just hearing from your brand.

## WHAT TO DO

1

### **Make Events a Content Engine**

Record highlights, capture quotes, and follow up with insights and testimonials.

2

### **Make it a Collaboration**

Work with partners or customers to co-host events and expand reach.

3

### **Let Gifting Do the Work for You**

Use gifting as an RSVP driver—a thoughtful invitation gift can boost attendance.

4

### **Get Feedback That Matters**

Capture feedback live via short forms or QR-code surveys to fuel future strategy.



# Data Led Events

Continuous learning about customers & prospects leads to better outcomes.



## Conference Briefings

Short, sharp trend sessions or consults focused on the immediate need of the audience



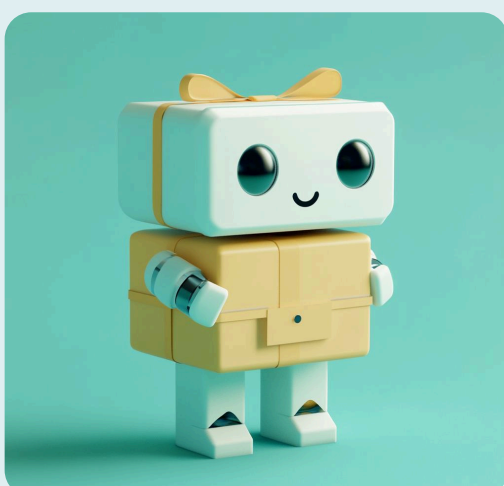
## Executive Roundtables

Invite only peer groups discussing shared challenges



## Hosted Meals &/or Experiences

Break bread with customers or prospects with curated topics or customer stories, or build an event around their shared interests.



### *To&From Pro Tip:*

Invite a few “friendlies” to participate free in exchange for case studies, quotes, or referrals. This turns your event into a downstream sales asset.



# Summary

The Modern Marketing Playbook provides a roadmap for creating impactful, human-centered B2B marketing campaigns that resonate, drive conversions, and scale with your business. By grounding your messaging in real-world insights, personalizing communication through persona-driven email sequences, reinforcing your message with thoughtful direct mail, and deepening relationships through engaging events, you can create a marketing engine that not only captures attention but also fosters meaningful, long-lasting connections with your audience.

This book has equipped you with actionable steps to transform your marketing approach, focusing on relevance, urgency, and empathy. By listening to your customers, speaking their language, and crafting experiences that surprise and delight, you'll stand out in a crowded digital world and build a foundation for sustained growth. Whether you're fine-tuning your current strategy or launching something entirely new, the principles outlined here will empower you to connect more authentically with your target audience and achieve measurable success.

The journey doesn't end with this book—keep iterating, learning from real-time feedback, and adapting your strategies to meet the evolving needs of your market. With the guidance provided, your marketing efforts will not only resonate today but will evolve as your business continues to grow.



# The To&From Approach

**STRATEGY + EXECUTION = ROI**  
*(minus the headache)*

From idea to delivery, we make engaging  
your sales funnel smarter and easier.

1

## **Project Scoping**

We define goals, budgets, and timelines up front, so everything runs smoothly down the line.

2

## **Data Enrichment**

We uncover what makes your people tick—hobbies, fandoms, favorite snacks—to drive more meaningful engagement.

3

## **Creative Development**

From custom packaging to hand-picked inserts, we make every detail a branded experience.

4

## **Gift Personalization**

Finding the right gift is part instinct, part insight—and 100% our specialty.

5

## **Seamless Delivery**

The last mile matters. We handle logistics, tracking, and reporting, so you don't have to.

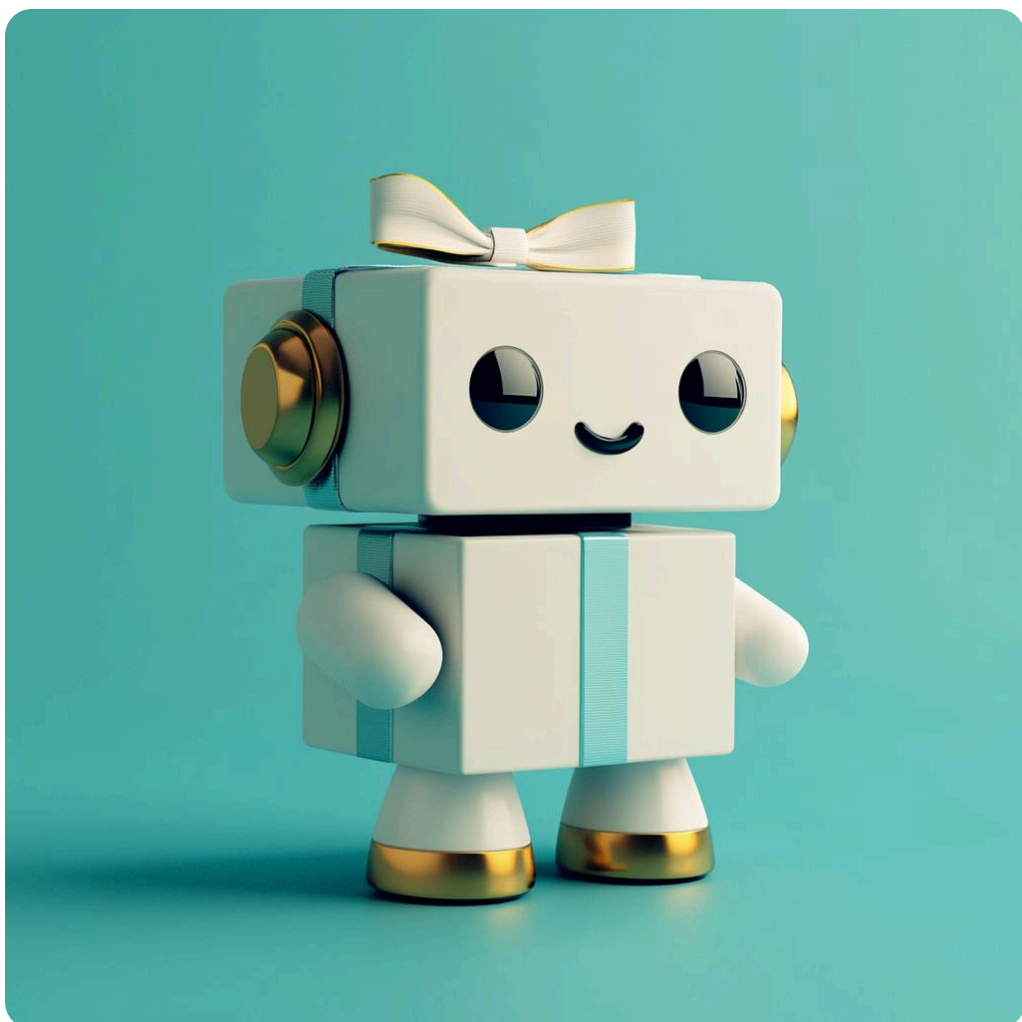




# Additional resources

- [Our Landing Page](#)
  - [To&From Gifting Blog](#)
  - [About To&From](#)
  - [Book a Meeting](#)
- 

## About To&From



To&From is a retail technology company building software to power gifting throughout the digital commerce ecosystem. Our AI expertise, unique methodology, and decades-rich retail experience ensure gifting success. For more information, please visit [toandfrom.com](https://toandfrom.com) or contact us at [hello@toandfrom.com](mailto:hello@toandfrom.com).

*Want to see how gifting can boost your pipeline?*

**Book a Call**

Book a meeting to explore how To&From helps sales and marketing teams create high-impact gifting strategies that drive engagement, accelerate deals, and strengthen customer relationships without adding complexity to your workflow.



# To&From

---

toandfrom.com