Message

From:	Scott Silver [ssilver@google.com]
Sent:	12/16/2014 5:07:11 PM
To:	Eisar Lipkovitz [eisar@google.com]
CC:	Neal Mohan [nmohan@google.com]
Subject:	Re: AWBID decision?

I missed that!!

Scott

On Tue, Dec 16, 2014 at 8:36 AM, Eisar Lipkovitz <eisar@google.com> wrote:

I know, was trying up the ante :)

Oren also wasted months he could have used to push Dima to actually run the test.

On Dec 16, 2014 8:10 AM, "Scott Silver" <ssilver@google.com> wrote:

That was my being tongue-in-cheek.

Scott

On Dec 16, 2014 8:03 AM, "Eisar Lipkovitz" <eisar@google.com> wrote:

Nah, they didn't ask for a meeting to discuss that would actually count as proposing a solution, hardly as valuable as complaining.

Eisar

On Dec 16, 2014 5:30 AM, "Scott Silver" <ssilver@google.com> wrote:
We should examine this 6-9 month delay in a media review. I have signed up for an available slot in mid February.

Scott

On Mon, Dec 15, 2014 at 10:35 PM, Neal Mohan <nmohan@google.com> wrote:
the 6-9 month delay due to indecision is pure bullshit of course.

On Mon, Dec 15, 2014 at 10:22 PM, Eisar Lipkovitz <eisar@google.com> wrote:
He heard indirectly about the meeting so I wanted to explain.

My response here was intentionally terse but I wanted to make sure you are prepared for him come Wed
---------- Forwarded message ----------
From: **Eisar Lipkovitz** <eisar@google.com>
Date: Mon, Dec 15, 2014 at 10:21 PM
Subject: Re: AWBID decision?
To: Aitan Weinberg <aweinberg@google.com>

We are only talking about few weeks of merely writing down what needs to happen so we can make a decision, not asking for more data.

Nobody is suggesting that we explicitly attempt to differentiate DBM .vs. AW based on access to inventory. The pitch is that AW demand has access to sell side inventory we control and understand and make stronger

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guarantees and has the side effect that our sell side pubs understand the only access through our AW demand is through DRX/AdSense.

We believe that RMKT primarily matters for large advertisers or sophisticated ones which could use DBM.

Anyhow, there is a clear urgency in getting the best short term solution for 2015 and that is orthogonal to the long term plan.

On Mon, Dec 15, 2014 at 3:27 PM, Aitan Weinberg <aweinberg@google.com> wrote:
gotcha. Jumping the gun on the Jan assessment, some thoughts ...

I agree with the goal of figuring out those two options, I suggested something similar last week in a 1.5 hr GDN-DBM discussion.

That said, I was hoping from your comment on Fri that it was more of a clear green light on AWBID vs do more thinking on which path to take. The unfortunate downside ... should awbid be the path ahead, we will have lost 6-9 months in market timing due to this indecision (starting back from mid year when we first slowed down awbid given the risk of dead end). Considering that DBM development is not frozen, perhaps the right msg to GDN eng teams is down down on AWBID right away, even at the risk of throw away.

My latest proposal to working group on GDN-DBM was one of speed to market. Fork objectives to each product:
- double down on programmatic direct through DBM
- double down on winning dyn rmkt through GDN

The upside of that strategy is speed to market. The downside is our clients need to use both.

The alternative of centralizing all efforts to one of the other is highly risky and highly unrealistic. That option would make sense if we're willing to take significant loss and pain for 2 years while we focus on the long term (an option I don't think we can stomach).

ALL THAT SAID, I guess I still worry we are making the wrong choices in how we're looking at this. What is bad about launching awbid? Why is cross exchange the crux of the differentiation between GDN and DBM? The working group (payam, brad, woojin, myself, dan taylor + two sales leads from DBM world) reached a conclusion / new proposal that doesn't hinge on cross exchange being the pillar of differentiation. The gist of it was to differentiate DBM on programmatic direct -- advertisers who have direct deals with publishers should gravitate towards DBM, others who are less focused on direct deals and looking for performance should gravitate towards GDN.

If we came to you, neal, scott w/a proposal on a different way to differentiate GDN and DBM other than cross exchange, does that change the decision to do this Jan assessment?

With 4-6 engineers we can solve this problem on GDN. To solve it on DBM will take many engineers and a major redesign in DBM to match all the automation we have done and are intending to do in GDN. Skyray is only one piece of the puzzle, there are many more pieces.

Thanks for reading through all this :).

On Mon, Dec 15, 2014 at 2:24 PM, Eisar Lipkovitz <eisar@google.com> wrote:
Neal is going to follow up over e-mail.

There are 2 parallel tracks we can take,

1) Make DBM performance/features comparable to the GDN solution
2) Figure out what is the next concrete steps we need to take on the AWBid side to get something competitive (from inventory standpoint).

We want you guys to breakdown specifics (in January) of either proposal with realistic ETA, so we can do one or the other or both.

On Mon, Dec 15, 2014 at 11:19 AM, Aitan Weinberg <aweinberg@google.com> wrote:
Hi eisar, what was the decision you alluded to on Fri? Is it straight forward enough to share by email or should we find a few mins to connect?

aweinberg@google.com
212-381-5668

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Aitan Weinberg
Group Product Manager
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