

From: Ladiges, Ryan </O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=4B409E2D93DC4E8D9D8857830FB80D9F-RLADIGE>
Sent: 4/24/2020 11:56:00 PM
To: Ladiges, Ryan <Redacted@t-mobile.com>; Fisher, Miles <Redacted@T-Mobile.com>; Giard, Jeff <Redacted@t-mobile.com>
Subject: review of potential sales opportunity through Branch
Start: Thu 4/30/2020 4:00:00 PM
End: Thu 4/30/2020 4:30:00 PM
Recurrence: (none)
Meeting Status: Accepted

Required Attendees: Fisher, Miles; Giard, Jeff
Categories: My Contacts
Attachments: Gating Process - Branch v2 (002).pptx

Hey Miles,

We want to get your input on a possible ad sales opportunity through Branch. Attached are a couple of slides that exemplify the opportunity, but in short we are trying to monetize the search finder box on Android phones (swipe up from homescreen). This may turn out to be more akin to ad words business model, but wanted your input before we ruled it as such.

Thanks

Ryan

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Meeting number (access code): 593 661 262 Meeting password: uNeAEcKz353

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Opportunity Overview Slide

GATE 1

Opportunity Description

- **What is it?**
Branch is an enhancement to the stock Android app drawer which would enable better on-device search results including deep-links and potential for ad inventory. Similar to Spotlight on iOS.
- **Sizing and growth potential?**
All TMUS Android, requires SDK on-device – we can require as part of ranging process. Subject to preload and MR schedule.
- **Revenue & Margins?**
Branch estimates are **Redacted Redacted** this is all EBITDA. Platform is valuable to marketers for both new user acquisition and user reengagement.

Key Players & Key Strategies

- **Key Players:**
 - TAM teams to work with OEMs to include SDK on new device launches (and MRs if we pursue that route) – Relatively light lift per Josh Finger
 - Branch has use cases in China & India that can be used as test case
- **Key Strategy:** Convince Google that Branch is complementary to primary Search business (unlock full functionality)

Why should T-Mobile be Interested?

- **Why is this interesting? Customer/ industry pain point?**
Improvement from default user experience, leverage existing behavior (finder/app drawer search) for better results and recommendation/monetization. Brings Android experience in-line with iOS (reduces clicks to desired content).
- **Synergies with rest of business? Assets we can leverage?**
Better user experience increases android retention. TMUS Android device

Hypothetical T-Mobile Entry

- **What does ideal product or service look like?**
See screenshots (next slide)

Risks

- App install monetization stream may conflict with Google RSA – need to confirm this doesn't jeopardize Search revenue.
- Lower than projected engagement
- **Redacted**