From: Amit Varia [REDACTED google.com]
Sent: 11/18/2019 6:29:32 PM
To: Ryan Fitzgibbon REDACTED google.com]
CC: Ryan Krueger REDACTED google.com]; Jason Krueger REDACTED google.com]; Guowei Liu REDACTED google.com]; Chunyue Liu REDACTED google.com]; Shirin Eghtesadi REDACTED google.com]; Zhen Liu REDACTED google.com]; Bashar Kachachi REDACTED google.com]; Lin Liao REDACTED google.com]
Subject: Re: Bing TCPA/ROAS performance after enabling AW ATB

Hey sorry - haven't had a chance to catch up here yet, but I'll try to look at the analysis today. Please do not share any external messages with MSFT until I've had a chance to review it.

On Mon, Nov 18, 2019 at 9:48 AM Ryan Fitzgibbon <REDACTED google.com> wrote:
 Would it be valuable to add the detail that the "% of overall spend decreases for MSFT even though spend grows overall"?
 The transparency here might help acknowledge the "Myx is better for Google" narrative they are running with, but also highlight that they benefit too when in the same portfolio.
 Happy the other way too, but just want to avoid the follow up questions by only saying "MSFT spend goes up".
 R

On Mon, Nov 18, 2019 at 9:44 AM Ryan Krueger <REDACTED google.com> wrote:
 Agreed this wouldn't be shared externally.

 While at the high level we don't see any impact I think it would be good to have a tops and tails view for internal purposes to see if any specific advertisers have been impacted. If this is a lot of work we can punt till a later date.

On Mon, Nov 18, 2019, 9:31 AM Jason Krueger <REDACTED google.com> wrote:
 Thanks, Guowei! This is very helpful.

 @Ryan Krueger clearly we shouldn't expose any specific numbers externally to the MSFT team but I think we can safely say the following:
  "SA360 engineering did a detailed analysis on SA360 portfolios enabled for auction-time bidding with Google Ads and Microsoft Ads campaigns. For these portfolios, we are seeing growth in MSFT Ads spend. Therefore, we do not see any evidence that MSFT Ads spend is being negatively impacted as a result of the adoption of auction-time bidding."

On Mon, Nov 18, 2019 at 9:23 AM Ryan Krueger <REDACTED google.com> wrote:
 Thanks Guowei.

 This is great news, glad the data shows we are not impacting MSFT negatively (in aggregate).

 Would you be able to pull the top 10 (increase in MSFT Spend) advertisers and bottom 10 (decrease in MSFT Spend) advertisers as a result of turning on ATB?

 @Jason Krueger thoughts?

 Thanks much

On Fri, Nov 15, 2019 at 8:27 PM Guowei Liu <REDACTED google.com> wrote:

EXHIBIT
PSX00426

I do the analysis for the Myx spend trend:

1) Select the bid groups that enable Myx and with other engine sub portfolio already created on both REDACTED and REDACTED there are REDACTED Myx bid groups selected.
2) Query the Bing spend and total spend for these bid groups for the dates between REDACTED and REDACTED
3) Draw the spend trend: https://screenshot.googleplex.com/rb9G2gduVAi

It looks Bing spend is stable and a little increased while total spend is growing faster than Bing.

https://docs.google.com/spreadsheets/d/17sNNnfgGMCmvfeXhVxaerWpH0plnuIU9Ldje5WYijzs/edit#gid=0

Thanks,
Guowei

On Thu, Nov 14, 2019 at 3:52 PM Ryan Krueger <REDACTED google.com> wrote:
+Shirin Eghtesadi as FYI

On Thu, Nov 14, 2019 at 1:17 PM Chunyue Liu <REDACTED google.com> wrote:
Amit,

The fundamental of marginal-roi optimization in our metabidder is to pursue that each entity in the portfolio reach the same marginal ROI. And if ATB is more efficient than offline, typically in such a equal-marginal-roi point, the ATB is at a target that is higher than offline (in terms of CPA/ERS), therefore, the outcome looks like the spend from offline portion "is shifted to" the ATB portion.

Depends on the landscape data, it is also likely that at this point both target is higher (or at least not lower) than the bid group target, in this case, it is as your stated, we are not reducing the offline portion spend but purely increasing the ATB porton spend.

On Thu, Nov 14, 2019 at 12:59 PM Jason Krueger <REDACTED google.com> wrote:
privileged and confidential

Are we getting any legal trouble from MSFT on this?

not yet, but MSFT is claiming that since we haven't integrated with their ATB system it's unfair. They are claiming that we are shifting spend away from MSFT.

Should this be a motivation for them to develop good ATB system and couple with SA360 in the future?

Agreed. They have asked us to integrate w their ATB. We have a proposal for a test that we are kicking off soon

On Thu, Nov 14, 2019 at 12:43 PM Ryan Krueger <REDACTED google.com> wrote:
As an additional ask, would we be able to get adoption #'s for MSFT enabled bidding (including eCPC)? This data is not available in the UI but should be available in the API

On Thu, Nov 14, 2019 at 12:41 PM Jason Krueger <REDACTED google.com> wrote:
+Ryan Krueger as well

On Thu, Nov 14, 2019 at 12:54 PM Jason Krueger <**REDACTED**google.com> wrote:
+Ryan Fitzgibbon for visibility

On Thu, Nov 14, 2019, 12:13 PM Zhen Liu <**REDACTED**google.com> wrote:
+Chunyue Liu +Guowei Liu

Guowei and I discussed it yesterday. In theory, it may be possible we drop MSFT performance however we need data to prove it.

Chunyue, Guowei and I will investigate the approach to do a system wide analysis to see if MSFT spend drops after Myx is enabled. Will keep you updated on the approach and result.

On Thu, Nov 14, 2019 at 9:08 AM Amit Varia <**REDACTED**google.com> wrote:
Hey Zhen - just wanted to kick off a thread after chatting yesterday. We want to validate that Bing performance doesn't degrade after a customer enables ATB on a X-Engine portfolio. Theoretically it shouldn't but MSFT has raised enough concerns that it's worth making sure there isn't an assumption I'm missing or unexpected behaviors.

Hopefully we can review this next week.

Thanks!

--

Product Manager, Search Ads 360 | **REDACTED**google.com

--

Ryan Krueger

--

Chunyue Liu | **REDACTED**google.com

--

Product Manager, Search Ads 360 | **REDACTED**google.com

--

Chunyue Liu | google.com

--

Ryan Krueger

--

Ryan Krueger

--

Product Manager, Search Ads 360 | **REDACTED**google.com

--

Ryan Fitzgibbon

REDACTED

Google | 121 Spear St | San Francisco | CA | 94105
Think with Google • Search Ads 360 website