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Subject: Search narrative outline

Here is a draft of our search narrative. I've left it as text for now rather than putting it into a presentation, but tried to include whatever relevant data we would want to use to explain and justify our areas of strategic focus. We can discuss this in more depth and iterate in our meeting at 11.

I've included the attached slide (it was created for our quarterly board of directors presentation) because we can reuse the precision graph in our search narrative preso to highlight Bing's progress on core ranking.

Kavi

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SEARCH NARRATIVE

THREE AREAS OF FOCUS

- 1- New UI
- 2- Core ranking
- 3- Key genres

1) NEW UI

What:

Modernize the UI. Make it more fresh in terms of look/feel. Provide seamless transitions between Google verticals/modes (SSFE). Show a left side panel so that can provide tools to allow users to slice and dice. Make searching faster and allow slice-and-dice of results.

Major projects in this space

- Single Search Front End
- Skunkworks
- Search as you type
- Search as an app

Why:

Search is about more than just web pages. There is a lot of media. There are entities and attributes, not just web pages. We want to push the envelope in a very core way to the user experience.

Competition:

Bing has differentiated by innovating on the look/feel. Flashy home page, left panel. Yahoo has also added a left panel. Google needs to become a leader in UI innovation.

Metrics:

It's the UX for our company's core product. It affects all users. There is nothing more core to our business from a metrics perspective.

2) CORE RANKING

What:

Accelerate progress improving our search results precision. People should find what they were looking for in the first search result for head queries and long-tail queries.

Why:

Google leads competitors. This is our bread-and-butter. Our long-tail precision is why users continue to come to Google. Users may try the bells and whistles of Bing and other competitors, but Google still produces the best results. As soon as this ceases to be the case, our business is in jeopardy.

Competition:

Bing has recently made clear, significant progress on ranking bringing the two search engines closer to parity. It is critical to redouble our efforts to maintain our lead.

Metrics:

[include precision graph. See attached ppt]

3) KEY GENRES

What:

Historically, Google has focused primarily on general ranking algorithms and UI. Three years ago, with universal search, a shift was made to increase our ability to provide new types of media in search results.

About one year, we began investing heavily in vertical-based improvements beyond universal. Staffed up ranking teams to improve shopping results, began rich snippets. More recently added focus on people.

Major projects/genres and metrics:

- Universal (50%): TV/videos (17%+), local (13%), shopping (6%)

[Provide some stats on universal usage, impact on users?]

Video has grown heavily in recent years.

TV is increasingly online and is an important growing space as well

- People (potentially 4%) / social (potentially 20% or more)

- Entities/shallow verticals (6% today, potentially as big as universal)

Show stats on reviews experiment and clear positive impact on users. Slide 4 here

- Onebox (3%)

Why:

This is the next frontier for search. Vertical search is of tremendous strategic importance to Google. Otherwise the risk is that Google is the go-to place for finding information only in the cases where there is sufficiently low monetization potential that no niche vertical search competitor has filled the space with a better alternative.

Competition:

Many, many strong niche players. Amazon (shopping), Yelp (local), Kayak (flights), Hotels.com (hotels), Edmunds (cars), AllRecipes (recipes), ...

In addition, Bing has explicitly made improving verticals a key part of their strategy to beat Google. Offer cashback (shopping), purchased Farecast (flights), partnered with Wikipedia (reference), Wolfram (calculations and facts), and built verticals for events and recipes. More verticals on the way.

On the people/social front, Facebook is executing well. Becoming a major platform to find information using friends and colleagues rather than web pages.

Our strategy:

a) Staff up large teams around our largest key verticals --> universal and more recently people/social.

b) Build a scalable system getting structured data, showing it in useful ways, and providing faceted search experiences (slice-and-dice) for many other verticals --> rich snippets and google squared. Also Wolfram Alpha partnership, likely Metaweb acquisition, and new extraction efforts.

c) Maintain parity or better with competitors on oneboxes. These are long-tail but also high visibility and are cited all the time by journalists and bloggers when comparing search engine features.