



# If Google Got Into Mail

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NOTE: The views expressed in the following dramatization do not necessarily reflect the views of its author or of Earth Class Mail. The views do, however, reflect what people in an innovative, fast-moving, world-beating company might think and say.

If Google got into mail, mail would never look the same again. Google would digitize mail, move a larger and larger share of mail and mail readers to the Internet, and either take market share from traditional businesses or put them out of business entirely.

Early users of Google may recall reaching the search results pages and scratching their heads. *How will these people make any money?* you may recall asking. *What's their model?* In the early days, Google did not have any paid ads. They displayed only what are now called the natural, or organic, search results.

Now we know. Google provided an extremely useful service that made life better. Only then did it introduce the advertising

One can imagine Google would begin its assault on the beaches of mail by bringing its generals into one room and asking them the same question its founders asked when they started their search engine:

**Sergey:** Where is the expensive consultant?

**Larry (pointing):** He's in the corner. He's the one with the marker.

*(Expensive Consultant raises his hand, the one with the marker).*

**Sergey:** Tell him to write on the white board, "Strategic Objective."

**Larry (nodding at Expensive Consultant):** Make it so.

## Strategic Objective

**Eric:** So here it is: how can we create a robust, mail-related mechanism that ensures a large number of people are exposed to advertisements?

**Sergey:** May I put it differently?

**Larry:** Do we have a choice?

**Sergey (ignoring him):** I'd put it like this: How can we get users of postal mail to come to a website or email application so that we can eventually introduce advertising?

**Larry:** Same way we did with search and Gmail —

**Eric:** — and the way we're doing now with YouTube, letting advertisers test, track, and quantify the success of their messages in the format that people most love: video.

## Target Audience

**Googler 4:** Do we work with the mailers somehow?

**Googler 15:** Not at first. And probably never as mailers, *per se*. The world isn't going in the direction of more paper, but less.

**Googler 4:** So before we have a network effect for advertisers, we have to focus on people who receive mail.

**Googler 15:** Half a trillion receipts a year.

**Eric:** Are the posts doing anything for these people who get mail?

**Sergey:** No.

**Eric:** *No?* How can you say no?

**Googler 92:** Not unless you count banking, outside the U.S.

**Larry:** And letting them buy stamps.

**Googler 45:** Didn't Marie Antoinette say that, shortly before she lost her head? "Let them buy stamps"?

**Eric:** Posts aren't doing *anything* for mail recipients, the people who make up one-half of every mailing transaction? But economists tell us that people value a thing according to what they pay, or are willing to pay, for it. What business can survive by pushing something without value?

**Googler 45:** Won't technology overtake them? It's going to get easier and easier to opt out with *technology* — forget the do-not-mail bills in state legislatures.

**Sergey:** They haven't figured out how to sell anything to recipients.

**Eric:** Do they not want to or do they lack imagination? I'm serious.

**Larry** (*rubbing his hands*): We're going to eat these people *alive*.

**Sergey:** We don't have an answer for you, Eric.

## Creating a Service in Demand

**Eric:** We just need to figure out how to make money by providing a *useful* service to *recipients* of mail.

**Googler 4:** Right. Same as we did with search and Gmail and everything else — create a capability so compelling that people absolutely will come and use it. Then present them with unobtrusive advertising.

**Larry:** I've got it! What are we about? *Information*.

**Eric:** So are the posts.

**Larry:** But another core competence we have is the Internet.

**Eric:** Where the posts have essentially thrown up their hands. Go on.

**Sergey:** And finally, we laser-target advertising messages to consumers better than anyone in the history of the world.

**Larry** (*unable to contain himself*): So why not make a digital image of every envelope and present that image to mail recipients – on a [website or in an email application](#)? Give them real choices! Like having their mail [opened and scanned in a clean-room environment](#).

**Sergey:** Da! Or shredded. Recycled. Shipped to any address. Digitally signed. Transferred to another user without anyone getting out of their chair. All of which they can do from anywhere in the world, at any time, just like email.

**Larry:** Enterprises would save millions by [lowering document-management costs and increasing productivity](#)! If we wanted to charge for the underlying service, we could pocket \$1-2 per mail piece for the basic transactions, more for digital signature, check processing, and secure, spam-free, non-phishing electronic messages. Imagine the e-government capabilities! Banks and credit card companies would be able to send statements themselves by email, instead of just sending a link.

**Eric:** Are you saying that for the increased power of choice and the convenience, mail recipients will pay more than the mailers paid for the stamps?

**Sergey:** Absolutely. But a post might also choose to charge almost nothing.

**Eric:** Why is that?

**Larry:** Because, Eric, they can make it up in advertising *and* every piece of mail scanned is a piece they don't have to deliver. Have you any idea how expensive delivery is?

**Sergey:** Given their margins, I would imagine it costs about 96% to 105% of the price of the stamp.

**Eric:** It's brilliant, guys.

**Googler 15:** But why would a consumer pay?

**Sergey:** Why do you pay \$400 for a BlackBerry and \$200 a month for service when you could get a basic cell phone for \$40 and your home phone is close to free?

**Larry:** Why do you buy a \$300 iPod and load it up with low-quality, stripped-down music files when you could play high-quality MP3s at home or in your car for no extra cost?

**Eric** (*getting the idea*): Why do I buy \$4 bottles of water that don't improve on most cities' tap water at all?

**Googler 15** (*dawning realization*): I like to be able to have everything in front of me wherever I am. I don't like having to go back to one place to communicate. I insist on being mobile. I try to be more and more productive.

**Larry:** Bingo. Fifteen years ago, everyone underestimated the attractiveness of mobile water, not to mention the mobile phone. There were estimates of a worldwide total of only *one hundred thousand* cell phones!

## Details of Implementation

**Googler 92:** Back to reality: Where do we present the mail images and the choices of what to do? On a secure website or in Gmail?

**Googler 15:** Both.

**Sergey:** I hate to say it.

**Larry:** Don't be evil.

**Sergey:** No, I really do hate to say it.

**Larry:** Say it already.

**Sergey:** We're going to have to let users check their postal mail in Outlook, too. And Hotmail.

(*Groans all around.*)

### The Network Effect for Advertisers Already Moving Advertising Dollars to the Internet

**Eric:** So we're agreed. And once there's a critical mass of users, we let advertisers in.

**Googler 15:** Like we did in search.

**Googler 92:** Like we did in Gmail.

**Googler 4:** Like we're doing in YouTube.

**Googler 45:** When you say advertisers — do you mean the "mailers"?

**Larry:** Same companies, yes.

**Googler 15:** But we'll destroy the postal services! Their bread and butter is advertising messages. And that financial model is already shaky.

**Sergey:** Their bread is stale. And they're using yesterday's butter. Sifting and transporting *paper* in the digital and Internet era and \$4.50 gas?

**Larry:** Eight bucks a gallon in Europe.

**Googler 4:** *Rancid* butter.

**Googler 45:** Very stale bread. Don't forget that people who get the paper mail generally don't want it as *paper*. I've seen user statistics somewhere that show that if you give users a choice, they'll ask you to shred or recycle nearly half of all mail, and open and scan nearly all of the other half, so that they only ask for a few percent of all mail in paper form. So why give them paper?

**Googler 92:** They'd also rather have some choice in what advertising they get.

**Eric:** Can anyone name even one successful business model that doesn't respect the consumer enough to give him choice?

**Larry:** I recently counted about a dozen new services that help people to opt out of junk mail. A few even let people opt *in*.

**Sergey:** There's an idea that has legs.

## Successful Businesses Offer Real Responses to Lasting Cultural Shifts

**Eric:** Question: Can mail survive the new environmental movement?

**Larry:** Check out this pile of sustainability reports, chief. The posts are at least trying to talk the talk. Except that when some of them have put a price tag on cutting the greenhouse gases produced by only their own activities – not counting the production of paper itself – they find that it costs more than their stamp revenue!

**Sergey:** They're shooting for efficiency: each package and letter should leave a smaller carbon footprint than before.

**Eric:** While trying desperately to *increase* the number of packages and letters?

**Googler 15:** And what happens when diminishing mail volumes drop so low that even these efficiencies go the way of the departing scale economics?

**Googler 4:** That's green?

**Sergey:** It'll do until green comes along.

## Build It and Who Will Come?

**Eric:** There's just one question.

**Larry:** Only one?

**Eric:** How do we get consumers —

**Sergey:** — and enterprises!

**Eric:** — and enterprises to get their envelopes scanned in the first place. So we can offer them all these great capabilities and then bring in advertisers?

*(All activity ceases. The men and women of Google are lost in thought. A fly, caught between the window and the screen, buzzes. Someone slurps Google-subsidized Coke from a straw.)*

**Googler 92:** Wait – this idea needs the posts. Let's buy a national post tomorrow.

**Eric:** Why not license all the technology to a post or a big mail services company and then let them offer the reception of mail, the scanning and archiving and advertising and so forth?

**Larry:** Eric's right. We're the software and Internet experts, while posts have the worldwide branch offices, the trust brands, and at least the potential to interact closely with mail recipients. In this case, it's not a bad idea — at least at first.

**Googler 102** (*arriving late, with donuts*): Hey, did you guys start without me?

**Sergey**: We only just designed a revolutionary mail model that's like a hybrid car: it starts out in both worlds – paper and digital – on its way to a purely digital model that allows for trackable, testable, opt-in digital and video advertising and gives the posts a messaging model into the future.

**Googler 102** (*pulling out Google Phone*): You mean a business model like this?

**Larry**: Is that – is that –

**Eric**: An image of an envelope?

**Googler 102**: And **options!** Shred, scan, unsubscribe, digitally sign, recycle, send secure email . . . Haven't you heard of **Earth Class Mail**? Oh and by the way, they're already working with –

**Larry**: Don't say it!

**Sergey** (*resigned*): Say it.

**Googler 102**: Microsoft, yes. Somebody's been doing their homework. Hey, what's this **ebook**? "Save Time, Monday, and Our Planet: Bring Postal Mail Online"? And it's been around for over a year?

**Eric**: This changes everything. For all we know, the posts are already implementing everything we've been talking about.

**Larry** (*sighing*): Could they actually beat us to this after all?

**Googler 92**: Donuts, anyone?