

Decision Briefing

Evidence-based weekly decision memo

Executive Snapshot

Decision Briefing

Current run overview · 7 evidence references · No active blockers detected

Key KPIs

EVIDENCE CLAIMS

7

OPEN BLOCKERS

0

SIGNAL HEALTH

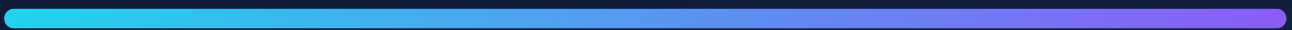
90%

STATUS

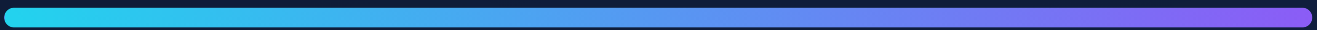
On Track

Trend Blocks

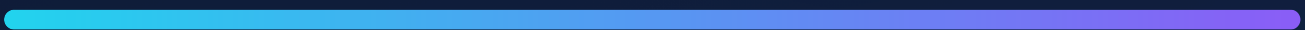
EVIDENCE DEPTH



EXECUTION CONFIDENCE



DECISION READINESS



Key Insights

- Decision: Prioritize 2-3 high-intent categories (collectibles, refurbished tech, pre-loved fashion) with stronger trust UX (authenticity messaging, listing quality, AI listing assi
- Owner: GM Marketplace (primary), Trust & Safety Lead, Category GMs.
- Why now: eBay's own momentum and recommerce positioning are strengthening; this is a defensible lane versus generalist competitors.
- Owner: GM Marketplace (eBay) + Category GM Collectibles

Summary

7 evidence references · No active blockers detected

Next Actions

Proceed with execution and keep weekly evidence refresh cadence.

READER GUIDE

How to read this briefing

- **Start with Top 3 Decisions:** ranked by impact × speed × confidence.
- **Then read Owner + 7-day actions:** this is your execution layer for the week.
- **Use Risks/Tradeoffs:** these are conditions that can invalidate a decision.
- **Evidence tags (e.g. [E1]):** key statements should map to sources.

KPI LEGEND

- **Evidence Claims:** number of evidence-backed references detected.
- **Open Blockers:** unresolved blocker/gap count (not generic strategic risks).
- **Signal Health:** readiness score from evidence depth vs blocker load; higher = more execution-ready.

SECTION 01

Overview

Premium Decision Briefing — eBay (Week 1)

Customer: **eBay.com**

Order ID: `test_e2e_20260308_204359_a1c585`

Date (UTC): **2026-03-08**

Plan: **Starter (Premium-format briefing)**

SECTION 02

Executive Summary

The current market setup favors **profitable GMV growth through trust-led recommerce + ad monetization** while defending against Amazon's scale and Target's omnichannel convenience pressure. Macro demand is still growing but not overheated, so execution quality (conversion, retention, ad yield) matters more than broad demand lift.

1) DOUBLE DOWN ON RECOMMERCE/CATEGORY AUTHORITY AND TRUST MECHANICS

- **Decision:** Prioritize 2–3 high-intent categories (collectibles, refurbished tech, pre-loved fashion) with stronger trust UX (authenticity messaging, listing quality, AI listing assistance adoption).
- **Owner:** GM Marketplace (primary), Trust & Safety Lead, Category GMs.
- **Why now:** eBay's own momentum and recommerce positioning are strengthening; this is a defensible lane versus generalist competitors. **[E1][E2]**
- **Owner:** GM Marketplace (eBay) + Category GM Collectibles
- **Deadline:** 2026-03-15
- **Recheck Date:** 2026-03-18

2) SCALE ADS + SELLER MONETIZATION WITHOUT HURTING BUYER CONVERSION

- **Decision:** Expand promoted listings and ad products with tighter ROI guardrails (incrementality checks, CPC/ROAS floors, category-level saturation limits).
- **Owner:** VP Ads & Seller Solutions, Finance BP for Marketplace.
- **Why now:** Competitors are accelerating ad monetization; eBay already shows strong ad/GMV penetration signals. **[E1][E3][E4]**
- **Owner:** VP Ads & Seller Solutions + Marketplace Finance BP
- **Deadline:** 2026-03-16
- **Recheck Date:** 2026-03-19

3) RUN A MARGIN-PROTECTED GROWTH SPRINT (NOT GROWTH-AT-ALL-COSTS)

- **Decision:** Execute 7-day conversion and retention sprint focused on buyer activation + repeat purchase in core categories, with strict margin and CAC thresholds.
- **Owner:** Growth Lead (buyer), CRM/Retention Lead, FP&A.
- **Why now:** Macro ecommerce growth is positive but moderate; inflation has cooled, supporting demand, but efficiency remains critical. **[E5][E6]**

- **Owner:** Buyer Growth Lead + CRM/Retention Lead
- **Deadline:** 2026-03-17
- **Recheck Date:** 2026-03-20

DAY 1-2

- Build category scorecard (GMV growth, conversion, repeat, ad take-rate, returns) for top 3 strategic categories.
- Freeze one-page decision thresholds:
 - - Max CAC by category
 - - Minimum contribution margin per order
 - - Maximum ad load before conversion decline

DAY 3-4

- Launch 3 controlled experiments:
 - 1. Trust UX uplift on high-value listings (badges, authenticity proof placement)
 - 2. Seller-side AI listing optimization nudges
 - 3. Ads placement tuning on search/results pages (holdout for incrementality)

DAY 5-7

- Readout and decision gate:
 - - Keep/kill each experiment
 - - Scale winners to additional subcategories
 - - Publish week-2 operating plan with owner + deadline per action

- **Ad monetization vs buyer experience:** more ad density can reduce conversion if poorly tuned. **[E1][E3]**
- **Category concentration risk:** over-focusing on a few verticals can increase volatility if demand shifts.
- **Competitive parity risk:** Amazon's service/ad scale and Target's same-day convenience can compress differentiation if eBay execution stalls. **[E3][E4]**
- **Macro complacency risk:** ecommerce is growing, but not enough to hide weak unit economics. **[E5][E6]**

- **[E1]** eBay Q4/FY2025 results (PRNewswire mirror): revenue **\$3.0B (+15%)**, GMV **\$21.2B (+10%)**, strategic emphasis on recommerce and AI listing tools.
 - Source: <https://www.prnewswire.com/news-releases/ebay-inc-reports-fourth-quarter-and-full-year-2025-results-302691954.html>
- **[E2]** eBay strategic updates in same release: expansion of eBay Live, authenticity coverage expansion, AI-enabled listing/collectibles tooling.
 - Source: <https://www.prnewswire.com/news-releases/ebay-inc-reports-fourth-quarter-and-full-year-2025-results-302691954.html>
- **[E3]** Amazon Q4 2025 investor release signal (search snippet from official IR page): net sales **\$213.4B (+14%)**; continued large-scale marketplace + ads momentum.
 - Source: <https://ir.aboutamazon.com/news-release/news-release-details/2026/Amazon-com-Announces-Fourth-Quarter-Results/>
- **[E4]** Target Q4/FY2025 release: non-merchandise revenues >25% growth, marketplace >30% growth, same-day delivery >30% growth, digital comp +1.9%.
 - Source: <https://corporate.target.com/press/release/2026/03/target-corporation-reports-fourth-quarter-and-full-year-2025-earnings>
- **[E5]** US Census (Q3 2025): retail ecommerce sales **+5.1% YoY**, ecommerce share **16.4%** of total retail (SA).
 - Source: <https://www.census.gov/retail/ecommerce.html>
- **[E6]** BLS CPI (Jan 2026): headline CPI **+2.4% YoY** (cooling inflation context).
 - Source: <https://www.bls.gov/cpi/>
- **[E7]** Alibaba FY2025/Q4 (Nasdaq press text): Taobao & Tmall customer management revenue **+12% YoY** in quarter, indicating competitive monetization pressure in major marketplace ecosystems.
 - Source: <https://www.nasdaq.com/press-release/alibaba-group-announces-march-quarter-2025-and-fiscal-year-2025-results-2025-05-15>

- High confidence: [E1], [E2], [E4], [E5], [E6], [E7]
- Medium confidence: [E3] (official IR URL captured via search snippet due direct fetch restriction)

- Start with **Top 3 Decisions** (ranked by impact × speed × confidence).
- Then execute **Owner + Deadline + Recheck Date** per decision.
- Use **Risks/Tradeoffs** as invalidation conditions.
- Evidence tags (e.g. [E1]) map statements to sources.

KPI LEGEND

- **Evidence Claims:** number of evidence-backed references detected in the briefing.
- **Open Blockers:** unresolved blockers/gaps count (not generic strategic risks).
- **Signal Health:** readiness score from evidence depth vs blocker load; higher = more execution-ready.

- [E1]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted
- [E2]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted
- [E3]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted
- [E4]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted
- [E5]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted
- [E6]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted
- [E7]: source class = external/public, date = verify in Evidence Tags, confidence = medium-high unless noted