

PROGRAMADIC (THE MUSICAL)

Written by
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Fiction

Summer/Fall 2023

PrograMADic is written as a movie script to first build out the story and then layer on the various elements to convert the story into a musical at a future point in time.

This script and musical is a work of fiction based on real-life events. Artistic liberties have been taken to enhance the narrative and create a compelling experience. Certain sequences, dialogues, and character interactions have been fictionalized or altered for dramatic effect. While certain elements and characters might be inspired by true stories, the portrayal of events, people, and circumstances has been dramatized and fictionalized for entertainment purposes and does not intend to present a factual account of the events, and any resemblance to real people, places, or incidents is purely coincidental.

PART 1

FADE IN:

"The people heard it, and approved the doctrine, and immediately practiced the contrary."

— Benjamin Franklin, The Way to Wealth

FADE TO:

1 INT. COLLEGE DORM ROOM -1999**1**

A college kid is plugging away on a desktop computer. Beige UPS packages are everywhere. Jonas Goodrich, a junior at a fancy Ivy League college, is on financial aid. But you would never know it. The camera pans to a poster on the wall of Milton Friedman. It says, "There is no such thing as a free lunch."

JONAS

(Turns around from desktop,
speaks directly to the
camera) Everything is free
on the internet.

JONAS spins his desk chair back around and gets back to typing like a madman. We'll meet JONAS later.

The voice that walks us through the beginning of it all is smart and to the point. Probably very good-looking too.

CONSULTANT (V.O.)

The first banner ads appeared on Wired's website, HotWired.com, on October 27, 1994, featuring brands like AT&T, MCI, Club Med, 1-800-Collect, and Zima. Most advertisers were confused by the web and suspicious of who these web-crawling users were. They bought ads anyway. By the boatload. It was the future of advertising and everyone knew it.

CUT TO:

2 INT. AD AGENCY - 1999

2

We see the nameplate of Milner Vincent Bennett McNamara Schulman on the door. A group of fat cat agency executives sit around a conference room table. They aren't actually fat. The men are wearing nice suits, no tie. The women are in grey pantsuits.

CONSULTANT (V.O.)

These ad agency people placed some of those first banner ads without telling clients, they figured it would be easier to explain after the fact. By the late '90s, advertising on the Internet was big business. Websites had banner ads, which were sold by agencies, while search engines had text ads, which were sold through automated auctions. This roughly corresponded to a bicoastal divide.

SMASH CUT TO:

3 INT. SWANKY L.A. OFFICE - 1999

3

We zoom in from above on a super cool open office in a retrofitted warehouse in Culver City. The parameter of the interior has glass wall offices. Casually dressed busy bees are buzzing about the place.

CONSULTANT (V.O.)

The techies on the West Coast decided it was best to charge advertiser clients when people click on ads.

We end up zooming in on a young surfer dude's computer screen. If Jeff Spicoli from Fast Times and Ridgemont High was a designer, we just found him. He's designing a banner ad called "Punch the Monkey."

DESIGNER

(Turns toward the camera)

No, seriously, dude. Back in '99, clients were all like, 'We want clicks, man!' They were so totally stoked on clicks. So we made ads that got clicks. Lots of clicks. Even if they were kinda, like, meaningless clicks.

(MORE)

DESIGNER (CONT'D)

It's supply and demand, bro. Now
take a hike. I'm like totally busy,
dude.

(Gets back to work)

SMASH CUT TO:

4 INT. SWANKY NYC OFFICE - 1999

4

Now we're quickly hovering down Park Avenue around 20th Street in the Flatiron District. We hear traffic and horns. It's New York, could the cliché be any other way? We enter a brick interior loft office through a floor-to-ceiling window. Worker bees buzz about. Everyone is fashionably dressed. It's like they just came out of a Vogue/GQ photo shoot.

CONSULTANT (V.O.)

Agency madmen wrote the rules
on the East Coast. They developed a
different model. Typical magazine
publishers like Time or Newsweek or
newspapers like USA Today or The
New York Times were, quote,
unquote, "going digital." It was
easy money everywhere.

A man and a woman are looking at the same computer screen. NYT.com is on the screen. We zoom in on an office phone. We hear a voice coming through the speakerphone.

VOICE

Look, I can sell my ad inventory
to you or someone else. Either way,
I'm getting a \$25 CPM. Are you in
or out?

WOMAN

Give us a second, Bob.
(hits mute button).
What a dick. He's totally fucking
us.

MAN

Because he can. Look, they told us
to get the campaign booked by end
of day. Fuck it. It's not our
money.

WOMAN

(hit mute button again)
OK, Bob, you gouged us, again. Fax
us the insertion order.

VOICE

That's what I thought. It's my pleasure to serve you.

WOMAN

Fuck off. Just fax us the insertion order.

(ends the call with a forceful click)

SMASH CUT TO:

5 INT. NEW YORK TIMES SALES OFFICE - 1999 5

We enter a busy ad sales floor. Several sales reps are on the phone getting deals done. Bob the ad sales guy is dialing a number on a fax machine.

BOB

Remember these. It's called a fax machine. I sold millions of dollars of ad using this beauty. I have a boat now, it's really nice. Supply and demand baby, it's a beautiful thing.

6 EXT. DORM ROOM - 1999 6

We see a printed logo scotch taped to the outside of a dorm room door. It says "Dealize." We enter the room.

7 INT. DORM ROOM - 1999 7

JONAS is facing a desktop computer screen. We get a good look around the place. JONAS swings around in his desk chair to face the camera.

JONAS

Hi, I'm Jonas Goodrich. Me and my brother Nolan started the mess advertisers are in today. We're the O.G.s of programmatic. We figured out how to turn internet deals for all kinds of stuff into an irrationally profitable newsletter. Companies like Barnes & Noble paid us commissions for referring customers. eCommerce companies in their infancy needed to show constant growth.

(MORE)

JONAS (CONT'D)

So they didn't try very hard to stop people like us from signing up, even multiple times, with bogus email addresses just to get freebies.

There was an easy trade in play and we were on the other side of it. That's when it clicked. These guys are paying us to give away their stuff. It seemed crazy because it was.

MUSIC: Something hip hoppy like "IT'S ALL ABOUT THE BENJAMINS by Diddy and Notorious BIG.

What y'all want to do? Want to be ballers, shot callers, brawlers, who be dipping in the Benz with the spoilers.

Hundred-dollar bills fall in slo-mo from the dorm room ceiling like confetti to cue up our storytelling CONSULTANT.

CONSULTANT (V.O.)

For two kids used to working minimum wage, it was intoxicating. But they needed to figure out how to get more people into their database. They needed to do advertising. So, the Goodrich brothers started buying ad space in other email newsletters. It was magic. Anything they spent on advertising quickly converted into new subscribers who quickly converted into commissions. They ran ads and generated revenue virtually instantaneously. It was one of the greatest arbitrages of all time. They couldn't buy ad space fast enough, literally.

8 INT. NEW YORK SPORTS CLUB - 1999

8

We stroll through a large gym floor full of machines. Men and women working out. The place is packed. Everyone looks great.

CONSULTANT (V.O.)

If it were 2023, the Goodrich brothers could easily have purchased ads at the prices they wanted on an ad exchange. Kind of like a stock exchange.

(MORE)

CONSULTANT (V.O.) (CONT'D)

Think of it as a democratized platform that gives publishers and advertisers of all sizes unprecedented access to a massive marketplace, where there are sellers and buyers at every price point. Deals are done in milliseconds. Only a few people know how it really works, but we'll get to that part later.

A PERSONAL TRAINER comes into view. We see his back. He's giving a lesson to a hot middle-aged woman. She looks like a pampered housewife. She's working on squats. She's wearing a New York Yankees ball cap. He's probably nailing her on the side. Wait... maybe it's more like she's nailing him.

SMASH CUT TO:

9 INT. FANCY HIGH RISE APARTMENT, NYC - NIGHT OR DAY

9

We see the same woman standing in a living room doorway. The skyline view behind her is spectacular. She's wearing nothing but high heels and a New York Yankees ball cap.

WOMAN

Are we doing this or what?

CUT BACK TO:

10 INT. GYM

10

MARK WALLACH

That looks great, Sheryl. Really great.

(turns to speak directly at us)

Twenty-some years ago ad exchanges didn't exist. Not until I came along. The bulk of advertising on the web were annoying banner ads, and those were being sold over lunches and dinners in New York City at prices far above what the Goodrich brothers wanted to pay. I changed all that. Yeah, I was working as a trainer at the time. So what. It had its perks. Then the American dream happened.

11 INT. NYC FANCY RESTAURANT - 1999

11

It's lunchtime. We meander through a busy restaurant, probably an upscale Italian place like Emilio's Ballato or a Frenchy place like Balthazar. We hear internet ad chatter and see deal-making in action as we pass through the place. Our CONSULTANT Sherpa is sitting at a table. We finally meet him.

CONSULTANT

I told you we'd meet. Too bad it's in a place like this. Back then it was banner ads. Today's all "programmatic" ad exchanges.

(uses air quotes with a dose of skepticism)

In '99, the Goodriches needed to expand their business as fast as possible. And they needed to do more than find people like this

(gestures to the dining room)

who only sell overpriced banner ads. They needed to find a guy who could goose an ad server. Ad-serving technology was at the center of it all. Do you even know what an ad server is? I didn't think so. So, who better to explain it than The Godfather of Programmatic himself, Brian O'Kelley... aka "BOK".

(uses air quotes, again)

We close in on BOK. A kind-looking motherly woman is sitting next to him at the table with our CONSULTANT. It's BRIAN's mom.

MOM

Go ahead, Brian. Explain what that ad server thingy does like you did for me in 1999.

(looks directly into the camera)

I had no idea what my smart son did for a living, but I had to tell my friends something.

BOK

Ok, let's give it a go, Mom. You like reading the newspaper, right?

MOM

I never miss a day... you know that
(silly, dismissive)

The waiter places various starter plates on the table and pours water.

BOK

Well... the internet is just like a newspaper only much bigger with lots of articles and pictures. Some people want to put their advertisements in this huge newspaper to show them to lots of readers. In your newspaper, like this New York Times right here,
(pick up folded newspaper off the table)

it's people who decide which ad goes where. An ad server is just like that person in charge of deciding where and when those advertisements should go in the newspaper. When someone like you or me opens this endless newspaper called the Internet, the ad server tries to understand who you are and what you like. For example, if you like gardening, which I know you do, the ad server will make sure you see ads about gardening tools. If you like baking or sports, the ad server wants to show you ads about baking items or sports products. That's it. That's how an ad server works. Only difference is it does that job billions of times every day.

MOM

(looking into the camera)
There you have it. That's why he's the Godfather.

CONSULTANT

Back to the Goodrich brothers. They needed to find a guy who could trick an ad server and create money from nothing. That's called an "arbitrage." And that's what Wallach saw before anyone else. But they also needed a tech guy to code it.

(MORE)

CONSULTANT (CONT'D)

That's where this guy came in handy.

(thumb points to BOK, he's eating a forkful of twisted pasta)

Brian invented a whole new technology for the Goodriches. And not just any technology. He built a technology that would change the way the entire advertising business works and open a can of worms worth billions of advertising dollars.

12

INT. DOUBLECLICK OFFICE NYC SKYSCRAPER - 1999

12

MARK WALLACH

(sitting in an open cubical)

Back to me. The Goodrich brothers needed me. That's right... a former personal trainer.

(flexes his guns).

The East Coast ad scene was dominated by one company - DoubleClick. It was founded in '96 in New York. They brokered deals between publishers and advertisers. They were the OGs who built technology for serving ads. By '99, DoubleClick's ad server was delivering billions of ads, and hiring anyone who could type. That qualified yours truly. Yeah, I did a stint making cold calls on Wall Street. It sucked on every level, but I was good. I knew almost next to nothing about stocks and I knew absolutely nothing about internet advertising. I joined DoubleClick anyway. But that's irrelevant. I can sell anything.

SMASH CUT TO:

A spoofed scene from The Wolf of Wall Street when DiCaprio's character asked Brad, "sell me this pen."

CUT BACK TO:

MARK WALLACH (CONT'D)

All the big agency and big brand accounts were spoken for, so I focused on finding new kinds of clients called direct-response advertisers, aka "performance marketers"

(Uses air quotes with a smart-ass grin).

These were advertisers exactly like the Goodrich brothers who wanted customers to do something, like click or make a purchase or take a survey. That's was the beginning of programmatic advertising. It dominates your world and you don't even know it. Don't worry about it, you're not supposed to. Here's NYU professor [FILL IN THE BLANK] to explain what I did.

CUT TO:

13

INT. LECTURE HALL AT SOME FANCY B-SCHOOL - PRESENT TIME

13

We fade in from the black of a packed theatre-style lecture hall. We close in on a CELEBRITY PROFESSOR getting ready to impress the students with his infinite knowledge and authentic charisma. Someone like Scott Galloway or Greg Coleman would smash this scene.

CELEBRITY PROFESSOR

Performance advertisers were high-maintenance. Real ankle-biting nit-picky types. While most of the salespeople at DoubleClick would close one deal and start working on the next one, Wallach would be crunching spreadsheets like a maniac and tinkering with his clients' ads as new data rolled in. He like AI before AI. Imagine this kids - Drugstore.com buys an ad for razors and blasts it out to twenty different sites. One percent of the people who see the ad on sites like Yahoo or CNET or Huff Post click through to Drugstore.com, but three percent click through when they see the ad on Fortune.com. The data shows the money. Quick!

(MORE)

CELEBRITY PROFESSOR (CONT'D)

Shift all the ads over to finance sites, double-down your ad budget, and check-in at the same time tomorrow to see what happened. Voila! For the first time, these direct response marketers could really track their purchases by the day or by the hour. That's what WALLACH figured out how to do. He juiced the logic of the ad server to his advantage.

We pan to the elated student audience and close in on MARK WALLACH in the middle of the pack hunched over his laptop.

MARK WALLACH

That's right. It turned out to be a crash course in how the digital advertising market worked. I became the top-selling salesman at DoubleClick, but you already figured that out.

We quick pan to our CONSULTANT sherpa who is seated on the side of the auditorium classroom. We see wide-eyed students. They're all mesmerized.

CONSULTANT

Then it all came crashing down in. On March 5, 2000 the dotcom bubble burst. DoubleClick's stock price plunged. They laid people off just as quickly as it had hired them. The suddenly distressed media division WALLACH worked for was sold off to another company. They did not have the same interest in a smarter ad server, so WALLACH quit and started his own company. The plan: Build an ad server that would always serve the highest-paying ads to the people who were most likely to click on them, and put the rest of the industry on its knees. At the time, it seemed ludicrously ambitious. Looking back, the ad server turned out to be the boring part. In the end, WALLACH invented the first programmatic ad exchange. It mutated into a monstrosity that would eventually collapse the entire advertising industry.

FADE TO BLACK:

BUSINESS NEWS ANCHOR (V.O.)
...After what they are already
calling the Black Friday of AdTech,
marketers around the world are
counting up the damage as Madison
Avenue runs for cover.

CONSULTANT (V.O.)
None of the programmatic experts
and certainly none of the marketing
leaders or jargon-filled talking
heads had a clue it was coming.
But there were a few who saw it
coming...while the whole world was
having a big programmatic party,
these outsiders and oddballs saw
what no one else could. They saw
the giant lie at the heart of
programmatic ad exchanges. They saw
that most of the ad inventory was
either fake or total dog hit.
Everything was a masquerade to
cover up a total lemon market
destined to collapse on itself. And
they saw it by doing something that
everyone knew but nobody could act
on because they were all stuck in a
prisoner's dilemma.

END PART 1