Go-To-Market with Merge

How to successfully sell your product integrations

For sales teams

MERGE

Welcome to Merge

This guide is designed for sales teams.

Merge is one API to add hundreds of integrations to your product. Merge's platform makes secure data access easy by offering Unified APIs across key software categories, including HRIS, accounting, CRM, file storage, and more. Over thousands of customers across all industries and sizes use Merge to power their integrations at scale.

Below you'll find an introduction to integrations and how they drive value for companies, information about Merge's robust approach to security and customer data, and further resources in the Appendix to better understand Merge and the integrations space.

Contents

The integration problem

Integrations impact sellers

When selling a B2B product, you've probably encountered the following scenario...

"Do you integrate with X?"

Company A

"We don't currently offer that integration."

⚠️

Deal lost

Company B

"We do...but we don't have dedicated resources to manage them."

⚠️

Customer churns

Company C with ⟩ MERGE

"Yes! We have hundreds of integrations that we manage and maintain!"

⊘

Win sales and retain customers
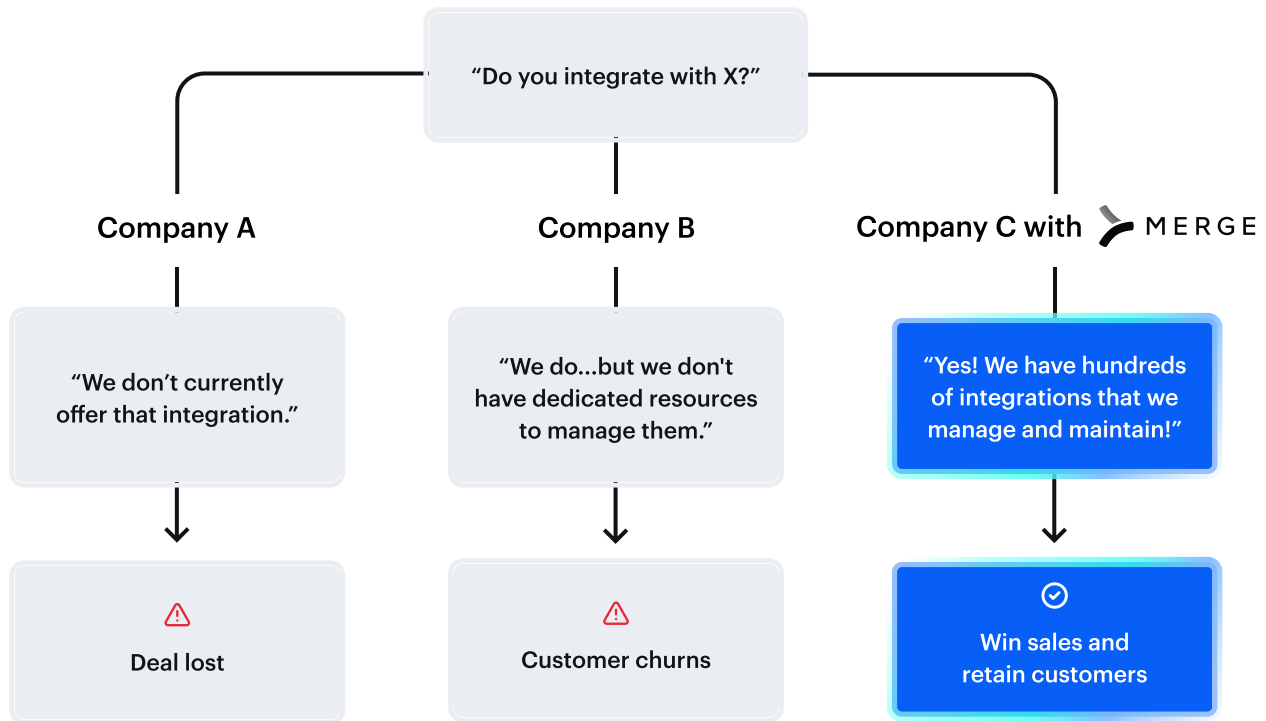
Integrations are a competitive advantage

Providing integrations is fundamental in bringing value to your customers

- ✔ **39%** of buyers look at "integration potential with currently owned software" as the **most important factor** when selecting a provider (Gartner 2023 Global Software Buying Trends).

- ✔ **Integrations** automatically connect data between various platforms, increasing productivity and transforming business operations.

- ✔ **Connecting data** increases your product value and delivers better customer success.

How Merge supports your sales goals

Merge's value to existing business

For your existing customers, Merge helps with the following:

Increased Stickiness

Selling integrations to your customers enhances their stickiness in the renewals cycle by making your product an indispensable part of their tech ecosystem, fostering long-term reliance

Upselling Opportunities

Integrations provide opportunities for upselling to existing customers who may want to expand their software's capabilities by adding more integrations

Enhanced Data Quality

Merge integrations significantly enhance data quality and accuracy compared to legacy approaches, by enabling real-time, automated data synchronization, reducing errors, and ensuring data consistency across connected systems

Reduced Manual Effort

Integrations automate data transfer and processing, reducing the need for manual data entry and error-prone tasks

Merge's value to new business

For prospects, Merge helps with the following:

Increased Stickiness

Selling integrations to your customers enhances their stickiness in the renewals cycle by making your product an indispensable part of their tech ecosystem, fostering long-term reliance

Competitive Advantage

Merge increases the win percentage of Enterprise customers by offering a new competitive advantage, capturing previously "un-winnable" business

Tighter Security

To decrease prospect risk, it is critical to enable a more secure, automated process of data transfer, as industry tailwinds shift towards an API-first approach

Customization

Integrations via Merge can be tailored to suit each customer's specific needs, allowing your Sales team to offer more personalized solutions

How integrations drive value

How Merge drives value

Quality integrations differentiate your product in the market.
Here are the features that back that up.

1. Breadth of integrations supported

You can now offer the integrations your prospects need.

> **Talk Track 1**
>
> **Not mentioning Merge:** "[Your company name] now connects to [number of integrations] in [category]. We support integrations including [list top integrations that your end users use]."

> **Talk Track 2**
>
> **Mentioning Merge:** "[Your company name eg. Ramp] partnered with Merge because of the speed at which their Platform and development teams move to add new integrations across different categories. Customer feedback and demand prioritize the next integrations they add. You can also check out their [Changelog](#) for the latest updates."

2. Seamless authorization for your customers

Emphasize how easy Merge is for your customers.

> **Talk Track**
>
> "With just a few clicks using Merge Link, you're able to seamlessly authorize your [category] platform to our product, saving you time and any potential headache when sharing data between these two systems."

3. Use case being solved and customer benefits

Being more specific to your product's implementation of Merge is best.

> **Talk Track**
>
> "Our integration will automatically pull in [field data name] into our product to support [use case]. This eliminates any manual work in updating data across multiple systems."

4. Data security and permissions

Emphasize that all authorized data is secure. You can share Merge's Trust Center and a summary of our General Data Protection Regulation (GDPR) controls for additional details.

> **Talk Track**
>
> "All data is securely processed and stored following industry best practices, including ISO 27001 and SOC 2 Type II, and complies with privacy regulations like HIPAA, GDPR, and CCPA. Furthermore, for every integration and data field, we can set permissions for what data is being passed. For example if PII data does not need to be shared, we can restrict that data so it does not ever leave your [category] platform."

5. Responsive customer support

Merge will support your team as you navigate issues that your customers encounter.

> **Talk Track**
>
> "Each integration is maintained and is continuously syncing. If any issues occur, our customer support team can quickly troubleshoot and resolve any issues."
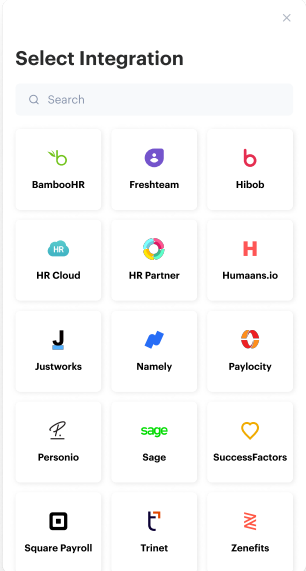
G2 — Easiest To Do Business With — WINTER 2024

G2 — Best Support — WINTER 2024

G2 — Best Relationship — WINTER 2024

Guiding your customers on Merge Link

Use the below messaging to help your customers use Merge Link

1. You will be guided through a simple flow of a few screens to authorize and create a secure integration. Note that the method of authorization will depend on the requirements set by the software provider.

2. Once you successfully authorize an integration, you are all set and can close out of the Merge Link screen. The data should start to sync between your [category] platform and our app after a successful authorization. It's as easy as a few clicks!

   (Note: If you run into issues with authentication, our customer success team can work with Merge to help you resolve the issues.)

Select Integration

🔍 Search

BambooHR	Freshteam	Hibob
HR Cloud	HR Partner	Humaans.io
Justworks	Namely	Paylocity
Personio	Sage	SuccessFactors
Square Payroll	Trinet	Zenefits

Security and customer data

Security features with Merge

Because Merge stores end user data, it has been designed from the ground up to adhere with the industry's highest standards of security and privacy.

SOC 2, ISO, HIPAA, GDPR

Merge is SOC 2 Type II, ISO 27001, HIPAA, and GDPR compliant. You can see more in our Trust Center for our real-time security and compliance posture in our continuous control monitoring dashboard.

SOC II Type 2   ISO 27001   HIPAA   GDPR

Data security at the highest levels of industry standards

Uptime
Fault-tolerant infrastructure ensures availability even during extreme demand.

Data centers
All data is stored in Amazon Web Services (AWS) data centers in North America and Europe with enterprise-grade physical and network security.

Encryption
Data is encrypted at rest and in transit, and PII is protected with an additional layer of application encryption.

Defense in depth
Merge maintains separate networks for web servers and databases, detects and logs access to systems, and grants unique credentials for each employee and tool.

Shift left
Our developers are proactive when it comes to security and use both DAST and SAST security scanning tools.

Penetration testing
Our security team conducts penetration testing every year and an automated scan on a weekly basis.

Data lifecycle

The chart below demonstrates where Merge fits into your product and your customer's platform. Feel free to use it on any calls if a customer is confused.
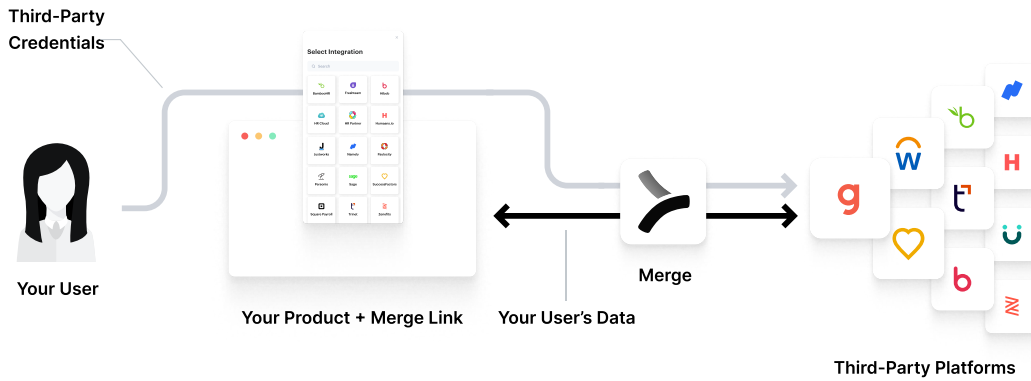
Appendix

Gain a broader understanding of Merge and
the integrations space

Quick objection handling

Q: "If I no longer want my data stored by Merge, how can I initiate that process?"

A: To ensure your data is no longer stored by Merge, you can reach out to us and we can delete all of your account data from Merge's Platform and logs.

Q: "Does Merge store my data?"

A: Yes. Merge securely stores the data you have authorized. Merge's data security is at the highest level of industry standards. Merge adheres to industry-standard compliance frameworks including SOC 2 Type II and ISO 27001, and complies with privacy regulations like HIPAA, GDPR, and CCPA.

Q: "Where does Merge store my data?"

All data is stored in Amazon Web Services (AWS) data centers in North America and Europe with enterprise-grade physical and network security.

Note: Merge Engineering allows customers to host data in our default US multi-tenant, our EU multi-tenant, or any available AWS region via single-tenant support.

Q: "Can I control what data is synced and stored in Merge?"

A: Depending on how we've configured Merge's settings, you can have flexibility to adjust the scope of the integration, which determines what data is synced and stored in Merge. If you have any questions or concerns about this, please reach out to us.

Core messaging

Ensure that your customers understand Merge so they can trust the way you offer integrations.

Merge messaging framework

1. "Merge is an API provider of B2B integrations that companies leverage to add hundreds of integrations to their product. This allows our customers, like yourself, to securely authorize and access data from hundreds of software providers."

2. "By offering integrations through Merge, we are able to reduce friction and seamlessly enhance our product experience."

3. "Merge is trusted and used by over thousand of companies across all industries and sizes, including Drata, Ramp, Navan, Gong, and Semgrep."

4. "Merge is a dedicated integrations provider who brings expertise and robust monitoring, resulting in a significant reduction in issues and downtime impact for our customers."

Feature messaging

Use the following language if your customers are looking to understand the value that Merge provides, including features and data security.

Connect effortlessly

"Merge enables you to connect your preferred software provider to [Company Name] in seconds in order to easily share relevant data."

Share your data securely

"Merge is built to protect your data in accordance to industry-standard compliance frameworks including SOC 2 Type II and ISO 27001, and complies with privacy regulations like HIPAA, GDPR, and CCPA."

Experience top-tier support

"Merge helps us proactively identify and alert you if there are any issues with your connection, reducing downtime impact."

Check out our case studies!

Read how other B2B companies are
using Merge to better serve their customers.

View all case studies ›

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