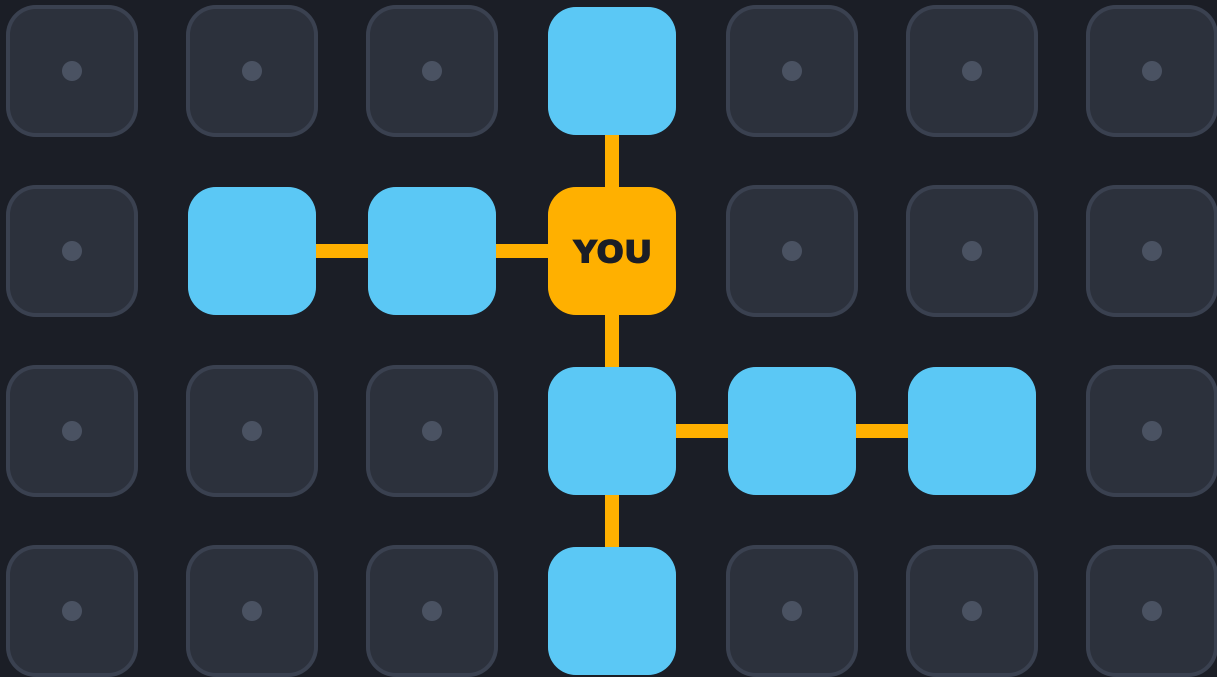




ONLY 29 OF EVERY 100 ENTERPRISE APPS ARE INTEGRATED

— INSTALLED BASE INTELLIGENCE SERIES

The Compatibility Economy

How integration requirements now decide B2B software deals, and why the stack a prospect runs should decide who we target

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ABOUT THIS REPORT

This report consolidates published findings from G2, Gartner Digital Markets, Capterra, MuleSoft, Zylo, Canalys, Crossbeam, and the State of SaaS Integrations study, current as of October 2026. Every figure links to its original source.

EXECUTIVE SUMMARY

The short version

B2B software is no longer bought on features alone. It is bought on fit with the stack a company already runs.

Buyers rank integration above price, sales cycles routinely stall on it, and incompatibility sits behind a large share of the purchases buyers later regret. After the sale, integrations become the strongest predictor of who stays and who expands, and a growing share of software now moves through partner ecosystems and cloud marketplaces built around specific platforms.

80%+

of software buyers say integration with existing tools matters, ranking it above cost

60%

of SaaS sales cycles now involve integration discussions

29%

of the 897 apps in the average enterprise are actually integrated

59%

of software buyers regret at least one purchase made in the past 18 months

92%

of SaaS companies see lower churn among customers who use integrations

\$85B

in software sales expected through hyperscaler marketplaces by 2028

The implication for go-to-market teams is direct: if compatibility decides deals, the technologies a prospect runs should decide who we target. Firmographic lists can't see that. Installed base data can.

CHAPTER 01

Buyers now judge software by what it connects to

01

Compatibility has moved from a technical detail to a buying criterion. In G2's survey of more than 1,700 software decision-makers, [over 80% said it is important that new software integrates with their existing solutions](#), ranking ease of integration even above the cost of the software. Vendors see the same thing from the other side: the State of SaaS Integrations study found that [60% of SaaS sales cycles now involve integration discussions](#), and [84% of customers call integrations very important or a dealbreaker](#).

80%+

of buyers rank [integration with existing tools](#) above the cost of the software

~1 in 2

B2B software purchases [now involve IT](#), per G2's 2025 report

69%

of buyers say [service providers and implementers](#) are a factor in their decision

HOW A STACK-FIRST EVALUATION RUNS

Gate 1

Does it fit our stack?

Integration, data flow, and security review



Gate 2

Does it solve the problem?

Use case, features, and trial



Gate 3

Will it pay back fast?

ROI case and implementation effort



Gate 4

What does it cost?

Price, terms, and total cost

Illustrative sequence based on the research above. Compatibility increasingly acts as the first filter, not the last.

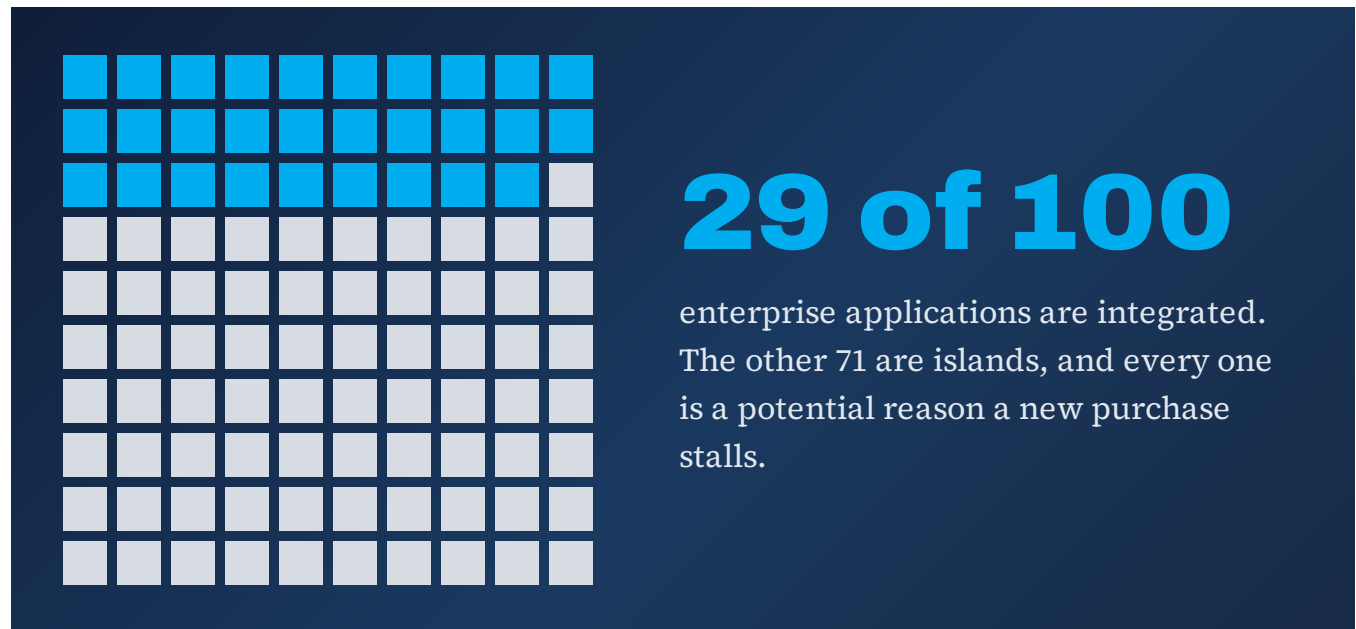
With IT now involved in close to half of software purchases, the people who own the existing stack hold a veto, and their first question is whether a new product fits what they already run.

CHAPTER 02

The integration gap inside every account

02

Every target account is already a crowded, partly disconnected environment. MuleSoft's 2025 Connectivity Benchmark, based on interviews with 1,050 IT leaders, found that [the average enterprise now manages 897 applications, yet only 29% are integrated](#). Zylo's 2026 SaaS Management Index counts [an average of 305 SaaS applications per company](#), with [211 SaaS renewals to manage every year](#).


95%

of IT leaders call integration a [hurdle to implementing AI effectively](#)

83%

say [integration delays equate to lost revenue opportunities](#)

211

SaaS renewals a year in the [average organization](#), each one a compatibility decision

For sellers, this gap cuts both ways. A product that connects cleanly to the systems an account already runs closes one of its most painful gaps. A product that doesn't simply adds to the pile, and buyers have learned to say no to that.

CHAPTER 03

Incompatibility is a leading cause of regret

03

Software regret is remarkably common. Gartner Digital Markets found that [59% of buyers regret at least one software purchase made in the past 18 months](#), and Capterra's 2026 research found [only 34% of buyers are successful adopters](#) with both a smooth buying and implementation process.

89%

of regretful buyers [hit an unexpected implementation disruption](#) first

#1

[Integration issues rank](#) among the most common implementation disruptions

44%

of manufacturers [call compatibility](#) with existing systems a top planning challenge

HOW INCOMPATIBILITY TURNS INTO CHURN

Incompatible stack

The product doesn't fit what the account runs



Implementation disruption

Integration issues, data migration problems, delays



Purchase regret

Costs rise, adoption stalls



Replacement

The tool is swapped for a competitor

In the UK, Capterra found [incompatibility with existing systems \(29%\)](#) was among the most common reasons buyers regretted a purchase. Every regretful buyer is a future churn event for one vendor and a displacement opportunity for another, and the accounts most at risk are the ones where the stack never fit in the first place.

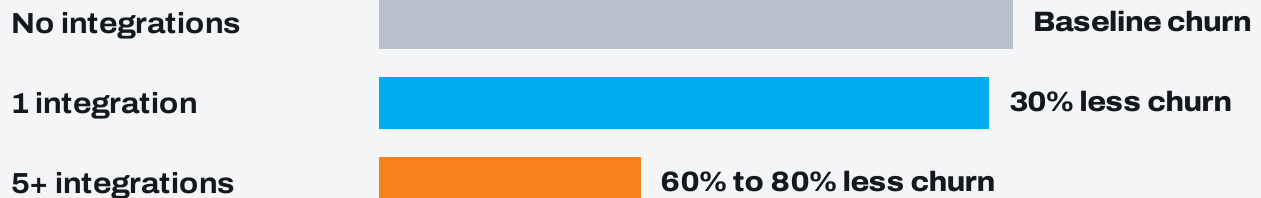
CHAPTER 04

Integrations keep customers and grow them

04

The case for compatibility doesn't end at the sale. The 2024 State of SaaS Integrations study, a survey of more than 100 B2B SaaS companies, found that [92% observe lower churn among customers using integrations](#), that integrations drove [35% of their expansions and upsells](#), and that [more than half of enterprise integrations are now built by partners](#).

CHURN FALLS AS INTEGRATION ADOPTION RISES



Relative churn by number of integrations adopted. Source: [Freshworks data reported by Crossbeam](#).

92%

of SaaS companies see lower churn when customers use integrations

35%

of expansions and upsells are driven by integrations

50%+

of enterprise integrations are built by partners, not vendors

That has a targeting consequence too. Accounts that already run the platforms our product integrates with are not just easier to win; they are more likely to stay and expand once they buy. Compatibility is a lifetime value signal, not just an acquisition signal.

CHAPTER 05

Ecosystems and marketplaces now carry the deal

05

More software is now bought inside a platform's ecosystem rather than around it. Canalys projects that [enterprise software sales through hyperscaler marketplaces will reach US\\$85 billion by 2028](#), up from US\$16 billion in 2023, driven by customers spending cloud commitments on third-party software.


50%+

of marketplace sales are [expected to flow through channel partners](#) by 2027

33%

of C-suite buyers [prefer to buy software through third parties](#) for a faster process

Hyperscalers are pouring investment into co-sell resources, incentives, and partner programs, and enterprise customers have [committed more than US\\$360 billion to the top three clouds](#). The result is a buying motion organized around platforms: AWS, Microsoft, Google Cloud, Salesforce, ServiceNow, and the other systems at the center of each stack.

“ In an ecosystem-led market, the most valuable list is the one that shows which accounts already run the platform your partner sells.

CHAPTER 06

Why firmographic targeting can't see compatibility

06

Firmographic data describes the company, not its environment. Two accounts can match an ICP perfectly on industry, size, revenue, and region, yet be entirely different opportunities for a product that lives or dies on integration.

ILLUSTRATIVE: A REVENUE TOOL WITH NATIVE SALESFORCE AND NETSUITE INTEGRATIONS

Account A	Account B
Industry B2B software Employees 800 Revenue \$150M to \$250M Region North America	Industry B2B software Employees 800 Revenue \$150M to \$250M Region North America
INSTALLED BASE Salesforce + NetSuite Both systems we integrate with natively	INSTALLED BASE HubSpot + QuickBooks Neither system has a native integration
● Tier 1: lead with the integration	Tier 3: nurture or exclude

Intent data doesn't close this gap either. An account researching revenue tooling tells us interest exists, not whether our product can plug into its CRM and ERP. Only installed base data shows which accounts already run the platforms that make a deal easy, and which run the ones that make it nearly impossible.

CHAPTER 07

The compatibility map: four tiers of technology fit

07

The simplest way to put compatibility to work is to sort every account into one of four tiers based on the platforms it runs. The tier sets the investment level and the opening message.

Tier 1	Native integration The account runs a platform our product integrates with out of the box.	<i>Integration-led ABM and partner co-marketing</i>
Tier 2	Certified partner connector A partner or marketplace connector bridges our product and their platform.	<i>Joint campaigns with the connector partner</i>
Tier 3	API or iPaaS feasible Integration is possible but requires configuration or an integration platform.	<i>Nurture with integration proof, services offer</i>
Tier 4	Incompatible or locked in The account runs a competing or incompatible platform under a recent contract.	<i>Exclude now; revisit at renewal or migration</i>

WHY TIERS BEAT A YES/NO FILTER

A binary "uses X" filter throws away Tier 2 and Tier 3 accounts that partners and services can still win, and treats them the same as accounts we can never reach.

TIERS MOVE

A new connector, a platform migration, or a contract renewal can move an account up a tier overnight. Revalidate before each campaign.

CHAPTER 08

08

Three compatibility plays

Each tier of the compatibility map supports a specific go-to-market play. These three account for most of the value we see technology vendors, ISVs, and partner teams capture from installed base intelligence.

01

Integration-led acquisition

Target accounts running the platforms we integrate with natively, and lead every touch with the integration.

- Accounts on our Tier 1 platforms
- Platform owners and admins first
- Integration demo, not product tour

02

Friction-point displacement

Target accounts running a competitor that lacks an integration their stack needs.

- Competitor users on our Tier 1 platforms
- Business owner and IT together
- "Here's what connects that doesn't today"

03

Ecosystem co-sell

Build joint pipeline with a platform partner using the overlap between their installed base and our ICP.

- Partner's platform users who fit our ICP
- Partner rep plus our AE
- Marketplace private offers and joint events

“ The best compatibility plays don't pitch the product. They describe the buyer's own stack back to them, then show what it could connect to. ”

CHAPTER 09

Scoring accounts on stack fit

09

A stack-fit score turns the compatibility map into a ranked account list. Here is how a revenue tool with native Salesforce and NetSuite integrations might tier five accounts with identical firmographics.

ACCOUNT	RUNS	INTEGRATION PATH	TIER	NEXT STEP
Account 1	Salesforce + NetSuite	Native integration	Tier 1	One-to-one ABM, integration demo
Account 2	Salesforce + Sage Intacct	Partner connector	Tier 2	Joint campaign with connector partner
Account 3	HubSpot + NetSuite	One native, one via iPaaS	Tier 2	Lead with NetSuite, offer iPaaS path
Account 4	HubSpot + QuickBooks	API or iPaaS only	Tier 3	Nurture with integration proof
Account 5	Competitor, new 3-year contract	Locked in	Tier 4	Exclude; flag renewal date

Illustrative example. Swap in your own platforms and integrations.

A STARTING WEIGHTING FOR STACK-FIT SCORES

40%

Core platform fit

Does the account run a platform we integrate with natively?

25%

Adjacent stack fit

Do surrounding tools connect through partners or iPaaS?

25%

ICP fit

Industry, size, region, and buying roles

10%

Timing

Renewal, migration, or new platform signals

CHAPTER 10

Messaging that starts with their stack

10

When we know what an account runs, the first line can be about their world instead of ours. These openers are starting points, with [placeholders] for your team to adapt.

TIER 1

Native integration

Subject: [Your product] + [Platform] at [Company]
Teams running [Platform] usually hit the same wall when [specific workflow]. Our native [Platform] integration closes that gap in [timeframe] without new infrastructure. Worth a 15-minute look at how [peer company type] set it up?

Why it works: It describes their real environment and removes the fear of a rebuild.

TIER 2

Partner connector

Subject: [Platform] + [Your product], via [Partner]
Since you run [Platform], you can connect [Your product] through [Partner]'s certified connector. We're running a joint session with [Partner] on [use case] next month. Want a seat?

Why it works: It borrows trust from a partner the account already relies on.

DISPLACEMENT

Integration friction

Subject: Does [Competitor] talk to [Platform] yet?
Most [Competitor] users on [Platform] tell us the missing link is [specific integration]. That's native for us. Here's a two-minute view of what the connected version looks like.

Why it works: It names a gap the buyer already feels every week.

Notice that none of them open with who we are. Each one leads with a platform the buyer already owns and a gap they already feel.

CHAPTER 11

Measuring the compatibility advantage

11

Compatibility targeting should earn its place with numbers. These six metrics show whether stack fit is changing outcomes across the funnel and after the sale.

Reply and meeting rate by tier

Do Tier 1 accounts engage more than firmographic-only lists?

Win rate by integration status

Are deals with a native integration path won more often?

Sales cycle by tier

Does stack fit shorten technical evaluation and security review?

Integration attach at close

How many new customers activate an integration in the first 90 days?

Churn and NRR by integration count

Do integrated customers stay longer and expand more?

Partner and marketplace pipeline

How much pipeline comes from ecosystem plays?

A 90-DAY TEST PLAN

Days 1 to 30

Map

Define Tier 1 to 4 platforms, build the installed base audience, and baseline current conversion rates.

Days 31 to 60

Launch

Run one integration-led play against Tier 1 and a control group from a firmographic-only list.

Days 61 to 90

Prove

Compare reply, meeting, and opportunity rates by tier, then expand to Tier 2 with partners.

CHAPTER 12

Who should build a compatibility strategy

12

Any company whose value depends on fitting into someone else's platform has a compatibility strategy, whether it is written down or not. These six teams have the most to gain from making it explicit.

■ ISVs and add-on vendors

Target: Accounts running the platforms your product extends, such as Salesforce, ServiceNow, Workday, NetSuite, or Shopify.

■ Integration and iPaaS vendors

Target: Accounts running combinations of systems that don't connect natively, where integration pain is highest.

■ Alliances and marketplace teams

Target: The overlap between a strategic partner's installed base and your ICP, for co-sell and private offers.

■ Systems integrators and consultancies

Target: Accounts on the platforms you're certified on, especially those adding adjacent products.

■ Platform vendors

Target: Accounts running complementary tools from your ecosystem, to prioritize partners and plan joint pipeline.

■ Data, security, and observability vendors

Target: Accounts whose core platforms your connectors and agents already support out of the box.

CHAPTER 13

How Data InfoMetrix builds compatibility audiences

13

Data InfoMetrix specializes exclusively in Installed Base Data and Installed Base Intelligence. For compatibility plays, we research which organizations run the specific platforms and platform combinations your product integrates with, align them to your ICP, and deliver verified contacts across the roles that own those systems.

EXAMPLES OF COMPATIBILITY AUDIENCES

- Salesforce + NetSuite users
- ServiceNow + Workday users
- Snowflake users on AWS or Azure
- Microsoft Dynamics 365 users
- HubSpot users by adjacent stack
- Shopify Plus + ERP users
- Any platform pairing your ICP needs

Built around your ICP

Custom-researched, never pulled from a fixed file

Platform combinations

Accounts matched on the full stack, not one tool

Verified

Contacts checked before they reach your team

Get counts and a quote for your compatibility audience

Tell us which platforms your product integrates with and who you sell to. One of our experts will respond within one business day.

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FAQ

Frequently asked questions

What is the compatibility economy?

A B2B software market where buyers judge products by how well they fit the technologies they already run, and where integrations shape retention, expansion, and partner-led buying.

Do integrations really reduce churn?

Yes. 92% of SaaS companies in the State of SaaS Integrations study see lower churn among integrated customers, and Freshworks reports 60% to 80% less churn with five or more integrations.

How is this different from technographic data?

Web-detected technographics see tools that leave a footprint on a public website. Compatibility targeting often depends on CRM, ERP, and back-office platforms that need researched installed base data.

Can I target accounts that run two specific platforms?

Yes. Data InfoMetrix builds custom audiences around platform combinations, such as Salesforce and NetSuite, aligned to your ICP and verified before delivery.

How important is integration to software buyers?

Very. In G2's survey, over 80% of buyers said integration with existing tools matters, ranking it above cost, and integrations come up in about 60% of SaaS sales cycles.

What is a technology fit or stack-fit score?

A score that ranks accounts by how well the platforms they run match the systems your product integrates with, combined with ICP fit and timing signals.

How do marketplaces change targeting?

Marketplace and co-sell motions run through platforms. Knowing which accounts run a partner's platform lets you build joint pipeline and private offers with that partner.

Where should a team start?

Pick the one or two platforms your product integrates with best, build that installed base audience, and run an integration-led play against a firmographic-only control.

REFERENCES

Sources

Every figure in this report links to the page it was taken from. Survey findings reported through press releases and partner pages are attributed to the original study.

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NEXT STEP

Target the accounts your product already fits.

Tell us which platforms your product integrates with. We'll build a researched, verified installed base audience of the accounts that run them.

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