

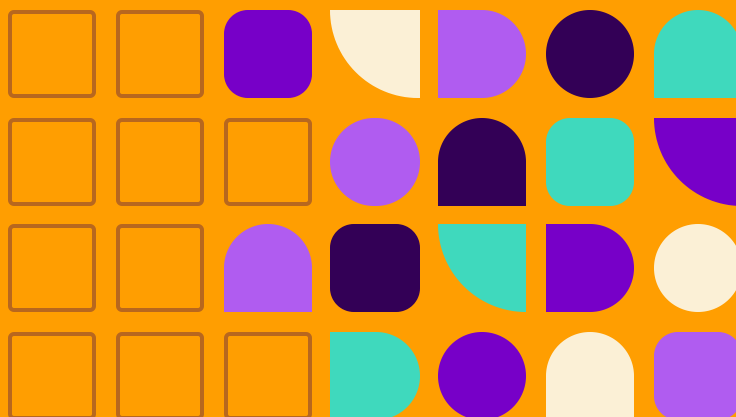
FREE GUIDE

BUYER'S GUIDE

From Spreadsheets to Licensing Software

A buyer's guide to licensing relationship management (LRM): how to know you are ready, what to evaluate, which questions to ask vendors and how to build the business case.

SPREADSHEETS → ONE PLATFORM



MADE FOR

Executives, licensing leaders, finance and IT teams
evaluating licensing software

Have you outgrown spreadsheets?

Spreadsheets are where most licensing programs start, and for a handful of deals they work. As the program grows, the cost hides in rework, chasing and missed revenue. Score each statement from 1 (rarely true) to 5 (always true).

We enter the same agreement terms in more than one place (contract, spreadsheet, finance system)

① ② ③ ④ ⑤

Only one or two people really know where everything is

① ② ③ ④ ⑤

Royalty reports arrive in different formats and need manual clean up

① ② ③ ④ ⑤

We cannot easily check reported rates against contracted rates

① ② ③ ④ ⑤

Approvals run through email threads, drives and file transfer links

① ② ③ ④ ⑤

We find out about missed MGs or renewal deadlines late

① ② ③ ④ ⑤

Licensees often ask us for status updates

① ② ③ ④ ⑤

Leadership waits days or weeks for a performance overview

① ② ③ ④ ⑤

Quarter close regularly takes longer than planned

① ② ③ ④ ⑤

We have grown the number of deals, but not the team

① ② ③ ④ ⑤

Your score	What it means
10 to 20	Your current setup is holding. Keep this guide for when the program grows.
21 to 35	You are feeling the strain. Start mapping requirements and costs now, before peak season.
36 to 50	Spreadsheets are costing you revenue and time. A licensing platform should be a priority.

The capability checklist

Licensing touches legal, creative, commercial and finance. Evaluate every vendor against the full lifecycle, not one team's pain. Mark each line **M** (must have) or **N** (nice to have) for your program.

Agreements and rights

- ☐ Structured terms: rates, MGs, advances, territories, channels, categories
- ☐ Rights availability view by territory and category
- ☐ Renewal, expiry and obligation reminders
- ☐ Amendments tracked with history

Product approvals

- ☐ Configurable multi stage workflows
- ☐ Workflows that reflect what each agreement allows
- ☐ Visual review with annotation and version comparison
- ☐ Audit trail of every decision

Royalties and finance

- ☐ Templated partner reporting with required fields
- ☐ Calculations driven by agreement terms, incl. tiers and MGs
- ☐ Validation that flags wrong rates and mismatches at submission
- ☐ Export to ERP and accounting systems

Analytics and partners

- ☐ Dashboards by property, partner, category and territory
- ☐ Self service partner portal for licensees and agents
- ☐ Forecasting from live data
- ☐ Role based access for internal and external users

Platform, security and IT

- ☐ Proven enterprise cloud platform with security certifications your IT team accepts
- ☐ Single sign on, permissions and data residency options
- ☐ Open API and ready integrations with your CRM, ERP and accounting tools
- ☐ Standard onboarding and data migration included, and a sandbox for testing changes
- ☐ AI readiness: how the platform connects to the AI tools your teams already use

16 questions to ask every vendor

Use these in demos and RFPs. Ask vendors to **show**, not tell: a live walkthrough with your own scenario beats any slide.

Fit and roadmap

- Which licensors and agencies like us use the platform today, and can we speak to one?
- Does it support licensor, agent and licensee models in one system?
- What has shipped in the last 12 months, and what is next?
- How does the platform handle AI today, and through which integrations?

Data and migration

- How do we migrate existing agreements, partners and history?
- Who does the import, and how do we validate it?
- How long did onboarding take for a program our size?
- Can we export all our data at any time?

Royalties and approvals

- Show a partner report being validated against agreement terms, live.
- How are tiered rates, MGs and cross collateralization handled?
- How do licensees submit products and see status?
- Can workflows differ by partner, category or territory?

Security, IT and cost

- Which platform does it run on, and which certifications apply?
- How does it integrate with our CRM, ERP and SSO?
- What is included in the subscription, and what costs extra (users, partners, onboarding)?
- What does support look like after go live?

Tip: Send vendors one real, anonymized agreement and one royalty report before the demo, and ask them to show both inside their platform.

Build the business case

A licensing platform pays back through three levers: time saved, revenue protected and revenue unlocked. Fill in your own numbers. Conservative inputs make a stronger case.

Lever 1 · Time saved	Your input	Notes
Hours per quarter on royalty collection, clean up and checks		Ask the team to log one quarter
Hours per month on approval admin and status chasing		
Hours per quarter building reports for leadership		
Loaded hourly cost of the team		Ask finance
Annual time cost = total hours × 4 (or × 12) × hourly cost		Estimate the share a platform removes

Lever 2 · Revenue protected	Your input	Notes
Annual royalty revenue		
Estimated share under reported or misapplied		Use past audit findings if you have them
MG shortfalls or true ups invoiced late or missed last year		
Revenue protected per year		

Lever 3 · Revenue unlocked	Your input	Notes
Extra deals the same team could manage		Capacity freed by levers 1 and 2
Faster time to shelf from quicker approvals (weeks)		Earlier sales, earlier royalties
Revenue unlocked per year		

Want this done for you? The free Licensing ROI Calculator on flowhaven.com estimates the admin time you could recover in a couple of minutes.

Plan the first 90 days

A good rollout is planned before you sign. This is the shape of a typical onboarding, so you can line up people and data early.

1

Plan

Agree scope, owners, go live date and success metrics. Name an internal champion.

2

Migrate

Fill in migration templates for agreements, partners and products. The vendor bulk imports, you validate.

3

Configure and test

Set up workflows and reports in a sandbox, test real user journeys, then move to production.

4

Go live and grow

Train the trainers, invite partners to the portal, review metrics at 30, 60 and 90 days.

Who to involve, and what they care about

Stakeholder	What they need to see
Executive sponsor	Program visibility, growth capacity, payback on the business case
Licensing and commercial	Rights availability, renewals, partner performance in one view
Brand assurance and creative	Faster, clearer approvals and less admin
Finance	Validated royalty data, on time close, clean exports to ERP
IT and security	Platform, certifications, SSO, integrations and data ownership
Licensees and agents	One easy place to submit, report and see status

Success metrics to agree up front

- Quarter close time
- Share of reports submitted on time
- Royalty discrepancies found at submission
- Average approval review time
- First pass approval rate
- Time to produce a leadership report

Licensing software built for the whole team

Flowhaven created the licensing relationship management (LRM) category. It is the only licensing solution built natively on Salesforce, trusted by approx 100 licensors, agencies and brands across sports, entertainment, gaming, music, lifestyle and art.

One platform for the full lifecycle

- ☐ Agreement Management with rights by territory and renewal tracking
- ☐ Product Approvals with configurable stages, annotation and audit trail
- ☐ Royalty Management with templated reporting, automated reminders and validation against agreement terms
- ☐ Analytics and Reporting with live dashboards for leadership

Built for IT and growth

- ☐ Native on Salesforce, the platform your IT team already trusts
- ☐ Self service partner portal at no extra license cost
- ☐ Integrations with ERP, accounting and CRM, plus an open API
- ☐ Standard onboarding with migration templates, bulk import and train the trainer

Before your demo: try the free Licensing Stack Check-up and Licensing Readiness Assessment on flowhaven.com, and bring your score.



NEXT STEP

See your own workflow in Flowhaven

Bring one agreement and one royalty report. We will show you how they work inside Flowhaven, from approval to analytics.

[Book a demo](#)

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