Majestic Wine toasts success with Sage X3

Specialist wine retailer drives growth and increased efficiencies with Sage X3

"I really like Sage X3; it integrates lots of functionality via a very user friendly interface."

Anastasios Vlachopoulos
Sage X3 Manager, Majestic Wine

The Challenge
Fortress Investment Group bought Majestic Wine in 2019 with a view to growing the business. However, Majestic's management team was still using spreadsheets and manual processes. This limited efficiency and deprived them of data insights.

The Solution
Majestic wanted to break down data silos, gain cross-functional data visibility and improve business agility. Having explored the options, they chose Sage X3.

The Result
With support from Sage partner X3 Consulting, Majestic Wine has created a customised X3 installation that provides a single source of truth, has generated substantial efficiency gains and data visibility. The company plans further customisation and extended use of Sage X3 going forward.

- 50% increase in productivity levels.
- Ongoing customisation supports notable growth.
- Sage X3 provides a single source of truth.

DSD BUSINESS SYSTEMS

Company
Majestic Wine

Location
United Kingdom

Industry
Wholesale & Distribution

Sage Products
Sage X3

Sage Partner
X3 Consulting

Majestic

About Majestic Wine
Majestic Wine, founded in 1980 and now owned by Fortress Investment Group, is the UK's largest specialist wine retailer, with more than 200 stores.

Upgrading for growth

Anastasios Vlachopoulos, Sage X3 Manager at Majestic Wine, appreciates the value of data and data analytics. So it is unsurprising that for him, the ability of Sage X3 to break down data silos and fuel data-driven decisions are major advantages. However, the introduction of Sage X3 proved to be something of a sea change for Majestic Wine. "Back in 2019 we were using another, quite basic, program and relied mostly on spreadsheets. It wasn't every efficient," Anastasios says.

Ultimately, several key factors motivated Majestic Wine's decision to replace their outdated systems. These included the legacy systems' inefficient manual processes and creation of data silos, which hindered the company's ability to effectively manage resources and obscured important data. Majestic wanted to break down those silos and make data visible, and collaboration possible, across functions. The company also wanted to automate processes with a view to reducing error, streamlining workflows and increasing efficiency. Above all, it wanted to make data-driven business decisions.

Meanwhile, Majestic Wine was actively pursuing growth. And so the search began for a customisable, scalable cloud-based solution that would integrate and automate business processes, make data visible and collaboration straightforward across functions, and provide a single source of truth.

Why choose Sage X3?

Having explored all of the options, Majestic Wine chose Sage X3, hosted on a private cloud, to underpin its growth. The ability of X3 to be a fully customised and adaptable single source of truth was – and remains – an important factor in Majestic Wine's choice of the platform, as was the ease with which it allows Majestic to automate many manual tasks, making them instantly more efficient. Upon installation, the company quickly set about customising the installation in line with its corporate objectives.

Majestic Wine was also impressed by the ease with which Sage X3 integrated with other platforms, including retail, inventory and supply applications. These are currently still integrated, but ultimately Anastasios aims to process as many business operations as possible within Sage X3 itself.

Knowing that its customisation of Sage X3 would be considerable, and that the platform would have a fundamental and long-term role in its business operations, Majestic Wine engaged X3 Consulting – and specifically, Sales Executive Jeremy Cook – to support its ongoing deployment and adaptation of the software. For several years, Jeremy has worked directly with Anastasios to plan and carry out important changes and customisation, and to make sure that Majestic is using the full potential of its cloud-based Sage X3 installation.

So far, Majestic Wine has made productivity gains of around 50% by using Sage X3 as a single source of truth for the business.

Ongoing upgrades

For example, Jeremy has recently supported Anastasios in upgrading to version 12 of Sage X3. Given that Majestic Wine has now had the system in place and customised for several years, this was a major undertaking but "working with X3 Consulting gave us lots of reassurance," says Anastasios.

Together, Anastasios and Jeremy planned the upgrade, which they initially rolled out in Majestic Wine's own test environment. Anastasios trialled the software first, then invited other managers to test the system one by one and over time. Once they were satisfied that the upgrade was ready for live roll-out, they upgraded the system live.

"With software, nothing is perfect, and we had a few minor issues. But these were quickly resolved," explains Anastasios, who goes on to say that he is confident that by the time the next Sage X3 upgrade is rolled out later in the year, there will be "no issues at all".

Looking ahead

Having reaped the benefits of using Sage X3 as a single source of truth – so far, Majestic Wine has made productivity gains of around 50% – Anastasios is keen to leverage the customisable nature of the platform and extend Majestic Wine's use of Sage X3 beyond financial management and financial reporting.

For example, he would like to move the functionality that is currently being handled by third-party applications that are integrated with Sage X3 into the platform itself. "We would like to start using it for sales more, and for inventory supply management. We would like to achieve a tighter integration with other specialised systems presently used within the company," Anastasios says, adding that customer relationship management (CRM) and credit control data are also prime candidates for integration and customisation of this type.

However, Anastasios' current priority is to move transaction approvals and audit trails from all parts of the business into Sage X3. This is facilitated by the cloud-based nature of Majestic Wine's Sage X3 installation, which makes it accessible from anywhere and thus ideal for roll-out across multiple bricks-and-mortar locations. As with the upgrade, this is being tested and introduced in stages; trials in the finance department have been successful and the processes are now being extended across the company.

For Anastasios, this is a natural progression in the use of Sage X3 as a single source of truth for the business, taking it into every part of Majestic Wine's operations. "Now we have a full audit trail, which can be checked against budget codes, we have all the records and it's very robust," says Anastasios. Using Sage X3 as a single source of truth in this way, with all supporting processes interlinked, also makes it easy to show regulatory compliance, he points out.

"Our users love Sage X3 landing pages, which show really useful information at a glance."

Anastasios Vlachopoulos
Sage X3 Manager, Majestic Wine

A basis for growth

Having used Sage X3 for several years, Majestic Wine is currently enjoying a sustained period of growth with plans for more. "We are expanding our store presence across the UK with the objective of achieving signifi cant growth in the coming year," Anastasios explains. He is quick to acknowledge the role that Sage X3 has played in generating efficiencies as part of that growth trajectory and looks forward to getting even more from a system he describes as "very user friendly".
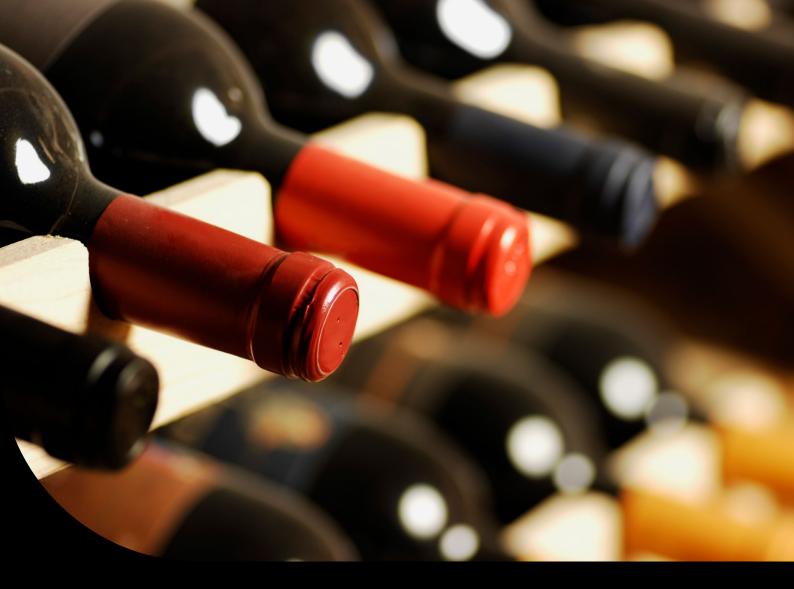
Jeremy Cook of X3 Consulting agrees: "What I hear, time and time again from people who use Sage X3, is how much they like the general look and feel and navigation around the product, that it's easy to use no matter what prior system they've experienced."

For Majestic Wine, that certainly seems to be the case, and the company's choice of cloud-based Sage X3, along with specialist technical support from X3 Consulting, now make it well placed to scale and customise its software to drive even greater success.