

# WIN STORY



## SAGE ERP X3



### Sherry FitzGerald No.1 Property Consultants in Ireland choose Sage ERP X3

#### CLIENT PROFILE:

Founded in 1982, Sherry FitzGerald Group has become Ireland's leading property and mortgage advisory firm with a branch network of 92 offices nationwide. Their depth of expertise in the property sector is unrivalled and their brands are among the most recognised in Ireland. The Group consists of four main business units:

- Sherry FitzGerald Residential Sales in second hand and new home properties;
- DTZ Sherry FitzGerald, which specialises in Commercial Agency, Professional Services & Property Management
- Sherry FitzGerald Financial Services, which offers clients independent mortgage, pension, life and home insurance advice.
- Sherry FitzGerald Countrywide, which encompasses the national franchise network.

As a Group they are proud to be Ireland's Number 1 property consultants servicing every county in Ireland.

#### BACKGROUND:

In 2012, Group Finance Director Steven McKenna took the decision to find a replacement finance system which would support the increasingly complex needs of the business. His finance team were increasingly frustrated with a system that was not designed to cope with cross-divisional and multi office accounts and his ability to extract insights and reports was limited through Excel reports. The existing system was laborious for users and the duplication of inter-company recharges through Accounts Payable and Receivable was a burden on his team and created large paper volumes. Fundamentally, the existing system would not support the drive to automate the business processes, become a paperless department, create efficiencies within the finance team and improve the reporting functionality across the Group.

#### LOOKING FOR THE RIGHT SOLUTION:

With a realistic budget in mind and a very clear view of his requirements, Steven's search commenced by taking counsel from his auditors and fellow accountants in business, combined with his own research online. He shortlisted Oracle, SAP, Accounts IQ and Sage.

After meeting all parties, the list was further shortened to just two options and more detailed demonstrations were given. Steven was very focussed on finding a solution to meet his core needs within the budget that he had set. He finally decided that Sage and their X3 ERP solution was the right solution for Sherry FitzGerald Group.

## THE RIGHT CHOICE:

The decision to go with K3 FDS and the X3 solution was based on several factors. Firstly, the Sage ERP X3 solution not only offered what Steven was looking for in terms of functionality but did so in a very unique way. X3 ERP is based on a single folder which brings with it several benefits most notable of which allowing users to access and interrogate real-time data across different companies without the need to login and out of different accounts. From a user point of view this functionality alone saves an inordinate amount of time by providing a seamless interaction with the information for multiple company accounts.

Steven commented "We expect to cut the time it takes to process invoices and inter-company recharges by 40% alone. This equates to 2 days a week simply by being able to use the standard functionality within X3".

In addition, with over 200 staff processing low value but high volume expenses the ability to automate the process through the additional Timesheet & Expense module will be of great benefit to the Group. It enables Sherry FitzGerald to move away from manual expense processing and automate the whole process from scanning, through line manager approval straight through to the accounts system. Paperless, fully traceable and significant savings on storage costs.

Typically, an issue which can be difficult to overcome with new ERP installations is user adoption. However, being able to show Steven's team the tangible time saving benefits of the new X3 solution has made adoption surprisingly easy. His team can see how much simpler their working lives will be through the automation and usability that X3 brings.

"We expect to cut the time it takes to process invoices and inter-company recharges by 40%, the equivalent of 2 days per week just through using standard X3 functionality".

## THE RIGHT PARTNER:

As well as the solution itself, Steven was impressed with K3FDS who worked tirelessly to get a thorough understanding of the business and Steven's requirements. With an initial focus on Sage 200 as a potential solution, K3FDS quickly identified that in order to achieve what our customer was looking for we'd have to explore Sage ERP X3. It was important to us to make sure that we truly listened to his requirements then to bring to life how the solution would work via our demonstrations.

We were absolutely delighted to be Steven's final choice and we're incredibly proud to be working with Sherry FitzGerald. We look forward to helping Sherry FitzGerald transform the way they currently work and supporting them on their journey.

## WHAT IS SAGE ERP X3?

Sage ERP X3 is a full-service enterprise management software system for mid-market businesses aimed at meeting the most elaborate business processes, while remaining cost-effective, quick to implement and simple to use. With a choice of languages, currencies, locations and legislations, Sage ERP X3 offers an efficient, multi-company solution.

Key features:

- Get up and running quickly and easily - Quick to scope, implement and roll out across your business
- Choose the technology that suits you – Work with your existing IT systems
- Manage your global operations easily – Manage multiple businesses across multiple countries
- Implement software that can grow and change with you – Have as few as ten or as many as 2000 users on one system
- Keep things simple for your users – Help your people to make the most of software that's simple to use.

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