

Success Story

200-year-old distillery grows with Sage Intacct

With plans for growth and capital investment, J&A Mitchell needed software that could support this growth

“Sage Intacct just makes life a lot easier and things get done a lot quicker.”

Hannah Fawcett

Finance Director, J&A Mitchell & Co. Ltd.



The Challenge

J&A Mitchell & Co. Ltd. (J&A Mitchell) had relied on Access accountancy software and manual processes for years. However, with ambitious plans for growth and multiple capital projects including a new bottling hall, increased productivity and storage, Finance Director Hannah Fawcett knew it was time to upgrade.



The Solution

Hannah assessed the accounting software market and approached Sage about Sage 50. However, a demo revealed that Sage Intacct provided exactly what the company needed. This pleased Hannah who, having worked with many accounting software packages during her career, had always liked Sage.



The Result

J&A Mitchell purchased Sage Intacct which was implemented via a Sage Partner, Phase 3. Since launching, Sage Intacct has made processes much faster, improved accuracy and greatly enhanced reporting for the business. It also integrates to their Brain payroll solution.

- Bank reconciliations previously took one day, now takes approximately 20 minutes per entity.
- Staff roles better defined and co-ordinated.
- Easy to report on entities or whole group.
- Inter-company transactions now quick and straightforward.

Sage

Company

J&A Mitchell & Co. Ltd.

Location

United Kingdom

Industry

Food & Beverage

Sage Products

Sage Intacct

Sage Partner

Phase 3



J & A MITCHELL AND CO. LTD.

• ESTD 1828 •

About J&A Mitchell & Co. Ltd.

Founded in 1828 in Campbeltown, J&A Mitchell is now a five-entity group including two distilleries and multiple whisky brands, serving customers worldwide.



Still growing after 200 years

Despite operating for nearly two centuries—since 1828, to be precise—Scots whisky producer J&A Mitchell & Co. Ltd. is not resting on its laurels. Based in Campbeltown, a historic whisky-producing area once declared “the whisky capital of the world”, the company began with a single distillery. It is now a five-entity group that distils, bottles and sells whisky to customers worldwide. With interest in Scots whisky booming and demand outstripping supply, J&A Mitchell now sees expansion opportunities. The company is planning to step up production at its two distilleries and has various capital investment plans underway.

For Finance Director Hannah Fawcett this is good news—but the company’s ambitions only added to her headaches when she came into the role just under two years ago. At that point, the firm’s accounting software was clunky and old-fashioned; reports took a long time to collate and produce, and inter-entity transactions were complex. Much of the finance department’s work was manual—which meant it took a long time and was subject to human error—and the staff involved often worked across admin and finance tasks. Hannah knew that if the company was to grow, it needed new accounting and financial management software to support that.

Self-funding demands financial clarity

Another reason for getting the company’s software in order was J&A Mitchell’s long-established commitment to financial prudence, which means funding projects through re-investment of profit rather than loans. When Hannah entered her role, the impractical nature of the accounting software made it almost impossible to get an accurate real-time overview of the situation for group entities and the group as a whole, while inter-entity transactions were fraught with difficulty. Challenges also arose from linking the company’s stock control system, bank statements and EPOS reports to the main body of financial data—this was largely time-consuming, manual work.

Hannah soon set out to find a replacement for the existing accounting systems. Having worked with most of the “big name” software during her career Hannah knew she liked Sage, but ran a thorough appraisal of all options on the market. She initially approached Sage intending to trial Sage 50, but when she saw a demo of Sage Intacct she was hooked. “I knew at once that Sage Intacct would do everything we needed to do,” she says.

J&A Mitchell bought Sage Intacct in June 2022, and immediately set about populating the new system and customising it to fit their own requirements.



“Sage Intacct is versatile; it is as great or little as you want it to be.”

Hannah Fawcett

Finance Director, J&A Mitchell & Co. Ltd.

Creating a bespoke solution

For set-up and implementation, J&A Mitchell worked with Phase 3, a Sage partner based in Manchester. Phase 3 helped to build in various bespoke reports and invoices, and aligned Brain payroll with the Sage Intacct system. “They were brilliant,” says Hannah. J&A Mitchell also integrated existing applications, such as their web expenses system, with Sage Intacct.

Hannah is quick to point out that although the Sage Intacct system as a whole has great potential for J&A Mitchell now and going forward, she did not implement everything at once, particularly since job roles and work allocation in finance were unclear at that point. “With one person doing everything it didn’t make sense to implement all the bells and whistles from the off. We decided to set up the system, get used to it and consolidate that learning in the first year or so, then roll out additional functionality over time,” she explains.

That strategic, step-by-step approach to implementation paid immediate dividends, as staff found the system easy to use. That has allowed Hannah and her colleagues to allocate finance tasks and areas of responsibility to staff more formally than before, and to co-ordinate workloads, knowing that Sage Intacct is a shared, real-time, source of financial truth for all of them. “The staff using Sage Intacct are confident in the system, they know that any mistakes are easily fixed and everything is much faster. It used to take us a day to do the bank reconciliation, now it takes about 20 minutes. Everything’s faster, automated, more accurate—it’s just night and day compared to the old system,” Hannah explains.

Real-time, inter-company reporting

Hannah is also happy to report that Sage Intacct has dramatically reduced the time taken for reporting, and allows her to immediately run reports that would have taken many hours of manual work and collation in the past. The system also gives the firm a real-time overview of the business that just was not possible before. “Now that we have the system embedded we are planning to look at using the dashboards more, because I already have managers coming in and asking for access to this and that information in Sage Intacct, they find it so easy to use,” says Hannah.

Sage Intacct has also proved revolutionary in terms of managing a multiple-entity group, since inter-company transactions are now straightforward and reporting is easy, whether for an individual entity or the group as a whole.



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Growing the system for a brighter future

Now that Sage Intacct has been in place for a while and staff at J&A Mitchell are working happily with it, Hannah has plans for further integration and use of the inbuilt functionality. Ideally, she would integrate the stock control system with Sage Intacct but admits this is a daunting prospect, since it is so fundamental to operations. “We’re exploring the options at the moment, but whatever we choose it will have to integrate with Sage Intacct either directly or through an API. We definitely want to integrate more and make greater use of the functionality Sage Intacct has,” says Hannah.

In the meantime, Hannah is pleased with the many wins that Sage Intacct has provided, stating that within the span of just a year J&A Mitchell has moved “tenfold from the starting point”. J&A Mitchell is looking forward to a very bright future indeed.



Sage



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