Success Story

Finance that moves at the speed of service

Historic hospitality brand chooses Acumen and Sage Intacct to unify finance and boost agility



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Regina Pruitt
CFO, Cote Hospitality

The challenge

A historic hospitality brand was running finance across disconnected applications with complex property interfaces. As the portfolio grew, moving to the cloud became a clear priority. The team needed a standardized GL and P&L structure, smoother data flow, and faster onboarding of new properties.

The solution

Cote adopted Sage Intacct — a modern, cloud financial platform — to streamline how finance works across properties. In partnership with Acumen Information Systems, the team organized a centralized chart of accounts and dimensions and mapped clean handoffs from operational systems into the GL to support future growth.

Results with Sage Intacct and Acumen

Finance is unified on a single cloud platform and operating on a consistent framework across properties.

- Reduced complexity by retiring disconnected, legacy systems.
- Standardized GL and P&Ls make rolling in new entities faster and more predictable.
- Operational data flows cleanly into Sage Intacct delivering clarity in the ledger.
- Existing AP automation solution able to easily integrate with Sage Intacct.
- Leveraging industry-specific forecasting tool that feeds data into financial statements and custom reports.

Sage Business Partner

Organization
Cote Hospitality

Location
Minnesota, US

Industry
Hospitality

Sage Products
Sage Intacct

COTE HOSPITALITY

About Cote Hospitality
For over 100 years, Cote Hospitality has built a legacy by offering guests an intimate collection of resort and camps experiences. Its vision and mission is to enrich the lives of its guests by creating exceptional experiences and memories.

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About Acumen
Acumen Information Systems is a Sage Diamond Partner helping growing businesses transform the way they manage accounting, finance, and operations though software selection, implementation, and ongoing support.



A hospitality company with deep roots and big ambitions
Cote Hospitality has been welcoming guests for generations across destinations where the experience is the product — rooms that feel like a retreat, golf courses that draw regulars, spa days that become traditions, and food and beverage that keep people lingering.

Like many historic hospitality brands, Cote grew up on grit, service, and systems that evolved over decades. Finance kept pace as best it could, operating across QuickBooks, Great Plains, and Clickbook — until growth made it clear the future needed to look different. The mandate was clear: move to the cloud, simplify the stack, and give a growing portfolio a financial foundation it can trust.

What needed to change behind the scenes
Multiple accounting platforms, many property interfaces, and long-standing routines added friction to month-to-month work. The team needed a way to standardize how finance runs across properties and to establish a reliable pattern for bringing operational data into the general ledger.

The right system and the right guide
Cote evaluated several options, but Sage Intacct stood out for its approachable interface and roadmap. Cote engaged Acumen Information Systems as the implementation partner — a team already fluent in hospitality finance and property interfaces. Acumen's external perspective helped the organization challenge long-held routines and move forward with confidence.

"After years of familiar routines, having an outside perspective to challenge our setup and guide us forward made all the difference," says CFO Regina Pruitt.

That outside perspective — plus tool-agnostic advice and recorded working sessions — helped the team challenge habits and move forward with confidence.

One structure across every property
First came standardization. Cote and Acumen designed a consistent chart of accounts and P&L structure that reflects how hospitality actually operates — rooms, golf, spa, food and beverage, and more. Using Sage Intacct dimensions, the same accounts now drive corporate, the summer camps, and each hotel, so new entities drop into a familiar GL framework. "Rolling in acquisitions is faster when the structure is ready for them," Regina says.

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Acumen's cadence and coaching turned change into a repeatable rhythm for Cote Hospitality.

A clean handoff from operations to the ledger

Hospitality environments generate a lot of daily activity across point-of-sale and other operational systems. Together, the team chose a clear pattern: flow day-to-day data through ProfitSword for budgeting and forecasting, reconcile there, then push the trusted, summarized results into Sage Intacct.

Acumen's experience with common hospitality interfaces reduced trial-and-error and kept the reconciliation discipline in ProfitSword, so only trusted summaries hit the GL. The sequence reduces rework, aligns operational and financial views, and keeps the ledger focused on the story leaders need to see.

Practical moves in payables

Cote reviewed several AP options with Acumen, who set up evaluation calls and laid out the trade-offs. With that perspective, the team ultimately kept its existing AP approval engine because its routing and controls align with how approvals actually move through the business. "We appreciated the transparent, tool-agnostic guidance," Regina says. "The goal was to choose what fit our processes — not force a standard kit."

Stepping back, AP automation is especially valuable in hospitality, where many properties, outlets, and approvers can slow invoice cycles. A modern AP workflow centralizes invoice capture and coding, applies spend policies consistently, and routes approvals by amount, department, or property — with a complete audit trail.

Change, managed like a project

Acumen set a steady cadence and ran the work in Kantata OX (formerly Mavenlink), so milestones, tasks, notes, and files lived in one place with notifications to keep everyone aligned. Status lived in one space, so decisions didn't stall.

Throughout the implementation, work sessions doubled as coaching: each module review started by examining the current setup — then mapped the future-state process in Sage Intacct. Every session was recorded and labeled, creating a bite-size library the team still uses for refreshers and onboarding. "Those recordings are gold," Regina says. "They're personalized instructions for our environment."

The new daily rhythm

Walk the finance floor today and you'll find a different rhythm. One cloud platform anchors the work, the patchwork of older systems is retired, and entities snap into a standardized GL that reflects how the business actually runs. Core metrics , including ADR, RevPAR, occupancy, revenue per guest, plus outlet-level views, now line up with how leaders review performance. Financial statements and a handful of custom reports run in Sage Intacct, while ProfitSword remains the forecasting hub. Stabilize first, then expand — that's the plan.

While hospitality remains hands-on, the cloud platform gives leaders the flexibility to jump in from anywhere when needed. "We wanted to keep our culture and our rhythms," Regina says. "Sage Intacct lets us do that while staying resilient."

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“Choosing Sage Intacct set the direction. Working with Acumen helped us get there.”

Regina Pruitt
CFO, Cote Hospitality

What’s next

The team is exploring more Sage Intacct reporting capabilities and keeping an eye on emerging AI features. They already use tools like Copilot and ChatGPT for ad-hoc analysis. Looking forward, they want systems that surface patterns automatically — flagging shifts in ADR, segment mix, or profitability drivers before the month-end close. “If the system can tell you what moved and why, you can act sooner,” Regina says.

For Cote, the real win is confidence. The company now has a finance platform designed for growth, a structure that welcomes new locations, and a partner model that keeps skills and processes fresh. “Choosing Sage Intacct set the direction,” Regina says. “Working with Acumen helped us get there in a way our team embraced.”

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