



Deliver More

Software for Today's Associations



If your association management software is creating more challenges than solutions, it may be time to rethink what you're using. With Cobalt, you get a solution that will give your staff the flexible tools they need, reduce your total cost of ownership, and provide a better experience for your members.

Cobalt takes the proven Microsoft Dynamics 365 platform and optimizes it for membership organizations with a selection of modules that can be configured for your needs. We've been a part of the association world since 1996, so we understand the need for software that handles complex dues structures, full event management, easy access to member engagement data, tight integration with accounting software, and much more.



*View our suite of
modules on the
other side.*

Transition with Peace of Mind

Cobalt is more than a vendor. We create a partnership with your organization that starts with listening to your challenges and continues with ongoing support after the software launch. Our commitment to a seamless platform shift results in peace of mind:

Our phased
process is designed
to deliver exactly
what you need.

We establish
specific,
measurable
objectives.

You get weekly
progress updates
with transparent
time-tracking.

We tailor strategies
to monitor, avoid, and
abate risks into each
implementation.

You have
project team
continuity from
start to finish.

Unlimited end-user
support so you
can rest easy after
you go live.



Our old vendor was unresponsive to the issues we had. Cobalt is always there when we need them and provides excellent customer service. When they came in to meet with us, it didn't feel like a typical sales pitch... They really took the time to listen to what we needed and why we needed it so they could tailor the implementation to best fit our requirements. We knew there would be challenges along the way... but when something needed to get fixed, it did get fixed. The relationship and people at Cobalt are important to us, because it's easy to work with them."

Matthew Epstein, Customer Relations Systems Coordinator, Financial Services Institute

Learn more at www.cobalt.net

For additional information, email us at: sales@cobalt.net

Cobalt's Modules

Designed for the Specific Challenges
of Membership Organizations

Coupled with the power of Microsoft Dynamics 365, our modules give your team efficient tools, engage your prospects, and deliver a seamless customer service experience to your members. Get the software designed to conquer your association's goals.



Membership

- Handles processes and details of both trade and professional associations
- Clone last year's dues structure for this year's renewals
- Set custom values for membership requirements or different membership levels



Portals & Web Elements

- Place interactive content anywhere on your website
- Create a searchable member directory
- Access data from Dynamics 365, including lists tailored to profiles and roles



eCommerce

- Process credit card payments and refunds directly on the portal and in Dynamics 365
- Allow customers to review their order history
- Build an attractive store for your organization's books, logo items, and other wares



Meetings and Events

- Plan and manage the details for meetings or events of any size or complexity
- Create a seamless user experience for participants with one-click registration
- Offer variable pricing and process group registrations in one transaction



Engagement Tracking

- See the right data at a glance for lead nurturing and member recruitment
- Give your team flexible control of engagement management that aligns with your mission
- Choose between custom or preset weighting for engagements based on any customer action



Accounting

- Get tight integration with your accounting software
- Manage discounts, revenue, and more in one place
- Create the reports you need to close your books and meet audit requirements



Marketing

- Nurture new membership leads with advanced CRM tools
- Create dynamic marketing lists to ensure that your marketing message reaches the right audience
- Create a connected, strategic user experience that highlights your organization's value



Service

- Wow your members with better response times and communication with interfaces customized for your team
- Make a dent in your overall operations cost to reinvest in ways your members will notice
- Increase your team's efficiency and systematically optimize all of your resources



Certification

- Utilize our flexible software for complex fee structures and requirements
- Integrate with our events module to tie courses to certification and continuing education requirements
- Streamline the process of annual renewals and recertifications

Schedule Your Showcase

The best way to see how Cobalt and Dynamics 365 can benefit your organization is to set up a showcase with one of our product specialists.

Email sales@cobalt.net to schedule your showcase.