

# PACbuilder Case Study: National Association of Professional Insurance Agents

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*PACbuilder is essential in effectively managing,  
growing, and filing the PIA's PAC program*

*"The main reason we chose PACbuilder to manage our PAC was Capitol Advantage's superior customer service."*

**- Kellie Bray, Asst. Vice President of Federal Affairs, PIA**

## Challenge

The National Association of Professional Insurance Agents was growing its PAC and required more efficient ways to manage donations and expenditures, and expedite their filing. **Due to the inability of the previous PAC system to keep pace with their growing needs, PIA needed a new system that worked best with their members.**

The National Association of Professional Insurance Agents (PIA) represents independent Professional Insurance Agents in all 50 states, Puerto Rico and the District of Columbia. PIA members are active in the politics that govern their communities, states and nation. As local owners of small businesses, PIA members support laws and regulations that serve the their neighbors' needs for availability of good, affordable insurance to protect the things they hold dear.

## Solution

The National Association of Professional Insurance Agents turned to PACbuilder to manage its PAC in July 2005.

**The single most important factor in PIA's decision to choose PACbuilder was Capitol Advantage's dedication to superior customer service.** "The feeling that I can pick up the phone and ask a question and not feel foolish is important. PACbuilder and Capitol Advantage's customer support make it easy to get things accomplished," said Kellie Bray, Asst. Vice President of Federal Affairs.

**PACbuilder's web-based application also makes PIA's PAC much more effective by easily targeting various donor groups.** Detailed reports and the use of source codes allows PIA to tag donor programs. PACbuilder's user-friendly sorting features make it easy to filter out who has given and who still needs to contribute. The broadcast e-mail tool then makes it easy to reach out and solicit contributions.

*"You don't know how much money I have saved on Tylenol because of PACbuilder. It is user-friendly and with a few clicks you're done!"*

**- Mike Becker, Manager of Political Affairs, PIA**

**PACbuilder makes FEC filing easy!** While the National Association of Professional Insurance Agents does not file many FEC amendments, Bray says "the ones we need to file are done easily and our questions are answered quickly. With PACbuilder, the filing process goes seamlessly!"

**PACbuilder is essential in effectively managing PIA's PAC program.** With the help of its easy-to-use features and Capitol Advantage's premium Customer Support team, the National Association of Professional Insurance Agents is able to identify crucial donors and focus on a plan for its solicitation efforts.

### **About PACbuilder**

PACbuilder automates compliance reporting requirements while providing you with an extraordinary suite of secure tools to help make your PAC stronger and more effective than ever in areas of contact management, communication, online fundraising, and more.

Capitol Advantage is the leading provider of innovative products and services designed to support government relations programs for over 1500 associations, corporations, media and educational institutions. Capitol Advantage offers a variety of hosted online solutions, including Capwiz·XC, an online advocacy tool with E-Mail Marketing, and PACbuilder, a PAC management tool. Our company also powers Congress.org, a free public-service Web site engaging citizens in democracy.

ONLINE ADVOCACY · GOVERNMENT RELATIONS · PAC MANAGEMENT

#### ROLL CALL GROUP

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