

# Knowlegis Case Study

## National Association of Professional Insurance Agents

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*Maximize the use of information technology to advance your legislative agenda*



*"Knowlegis Advocacy Event Manager and its Advocacy Event feedback forms make our membership feel very important. They love pictures, the maps and its professional feel."*

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

### Challenge

Every year the National Association of Professional Insurance Agents (PIA) hosts its Federal Legislative Summit, and like PIA, it too is growing. PIA staff needed better software assistance to properly track appointments and data assessment on feedback forms from PIA members. "After their Capitol Hill visits, members turn in their printed feedback forms and we'd do a staff review. However, the number of [feedback forms] now required an efficient way to analyze this data," said Kellie Bray, Asst. Vice President of Federal Affairs for PIA.

The PIA wanted a streamlined online solution that could increase their lobbying results – from scheduling Capitol Hill and in-district meetings to communicating with congressional staff to analyzing advocates' feedback and legislative activity.

The National Association of Professional Insurance Agents 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 are concerned that laws and regulations serve not just the business community, but also their neighbors who depend upon the availability of good, affordable insurance to protect the things they hold dear.

### Solution

Eager to refresh their advocacy practices, Kellie Bray began evaluating technology companies that could specifically address lobbying needs. PIA selected Knowlegis after a careful assessment of other providers. In May 2006, Bray and her members used Knowlegis to manage PIA's annual Federal Legislative Summit in Washington, D.C.

Since turning to Knowlegis to coordinate its Federal Legislative Summit, PIA has increased event attendance each year. PIA encourages its members to set up their own meetings with legislators using the Knowlegis Advocacy Event Manager module. Thanks to effortless online forms, PIA members and Federal Affairs staff are communicating and are more organized.

Knowlegis' Advocacy Event Manager has taken PIA's Federal Legislative Summit to a new level. According to Bray, the feedback forms, that includes a map of Capitol Hill directing members to the appropriate Hill office building, as well as the name and photo of the elected official with which they

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are meeting, "make our membership feel very important. They love the feedback forms!" Now, after meetings with elected officials, these same members enter their meeting feedback into an online form. The feedback results are calculated automatically and are available in real-time for PIA staff without the hassle of handling hundreds of pieces of paper.

PIA uses the advocacy event feedback results to generate graphs that show which members were in favor and in opposition to legislation. "This is a very powerful way to show members how legislators are responding to our issues," Bray says.

PIA also uses Knowlegis to connect with Capitol Hill directly using the Knowlegis Toolbar and Capitol Messenger (the email-to-Congressional staff tool) to invite Members and Congressional staffers to their congressional receptions. PIA has observed a spike in their response rates since working with Capitol Messenger. Bray particularly appreciates the ease of Capitol Messenger saying, "My feet are grateful to Knowlegis because we no longer have to run all over the Hill delivering invitations."

### **Best Practices Lessons**

This case study represents a best practice for groups that want to fully integrate technology into their grassroots efforts and lobbying activities:

- **Increase Membership Participation:** PIA provided a detailed issue backgrounder to their advocates, ensuring they would gain more credibility with legislators, thereby increasing industry visibility.
- **Gather Information for Legislative Strategies:** PIA needed an innovative yet unobtrusive method for their staff and their membership to capture meeting feedback. By measuring their grassroots and grasstops connections, PIA could successfully track significant interactions and develop targeted campaigns.

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