



**SOCIETY OF  
ACTUARIES**

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# Staff Corner

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To continue the transparency effort, this Staff Corner is about how the Society of Actuaries (SOA) schedules email blasts and how members can set up their email preferences to ensure they get the emails they need.

An email targeted to you is welcomed information. An email not targeted to you is more often not welcomed. This dichotomy is important for both the sender—the SOA—and the receiver—you—as both parties have a role to play to improve the signal-to-noise ratio.

## ON THE SENDER SIDE

Let's understand how the SOA uses email to raise awareness and engage our members and friends. Keep in mind that the SOA operates in a legal environment with requirements like General Data Protection Regulation in Europe and Canadian spam law. In addition to what's legal, the SOA strives to do what's effective, and we are always refining our practices. Essentially, we hope to give our members and stakeholders the information they want at the right time.

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How do we do this? For each blast email, we prepare an email pull from our database using selected criteria. Usually, the criteria include the following:

- section membership,
- primary area of practice,
- credential,
- years since designation,
- geographic area and
- past event registration.

This allows us to ensure only the relevant target audiences receive a specific email.

We are working on adapting our process further and would like to offer additional choices based on more specific preferences of frequency and interest areas.

## ON THE RECEIVER SIDE

We hear frustration from members when important emails are not received or too many emails are received. The most common causes for missed email are (1) incomplete email preference choices and (2) company filter or individual automated rules moving the email to the receiver's junk folder. (Please check your spam settings.)

Yes, personal settings are key to filtering out noise and receiving the relevant emails from the SOA. Let's investigate email preferences further, then discuss how to set up your profile.

### Email Preferences

After you log into your account at [SOA.org](http://SOA.org), you can click on the link for email preferences to access the Manage Email Preferences page (Figure 1, next page).

This new page (Figure 2, next page) gives you several options for choosing which emails you want to receive.

#### General Toggle Button

We first have a general toggle button with the following options:

- I agree to receive SOA emails [...]
- Please unsubscribe me from all SOA email lists [...]

Within the first choice, you will receive emails based on the information in your profile, such as your primary area of practice, your geographic location and so on. If you would like to receive only specific information within certain areas of interest, such as data-driven tools or business management, you can further select those topics from the list.

#### Section Emails

Section members have a dedicated toggle button with the following options:

- I agree to receive email from the section of which I am a member [...]
- Please unsubscribe me from all SOA section emails [...]

Figure 1  
Accessing Email Preferences

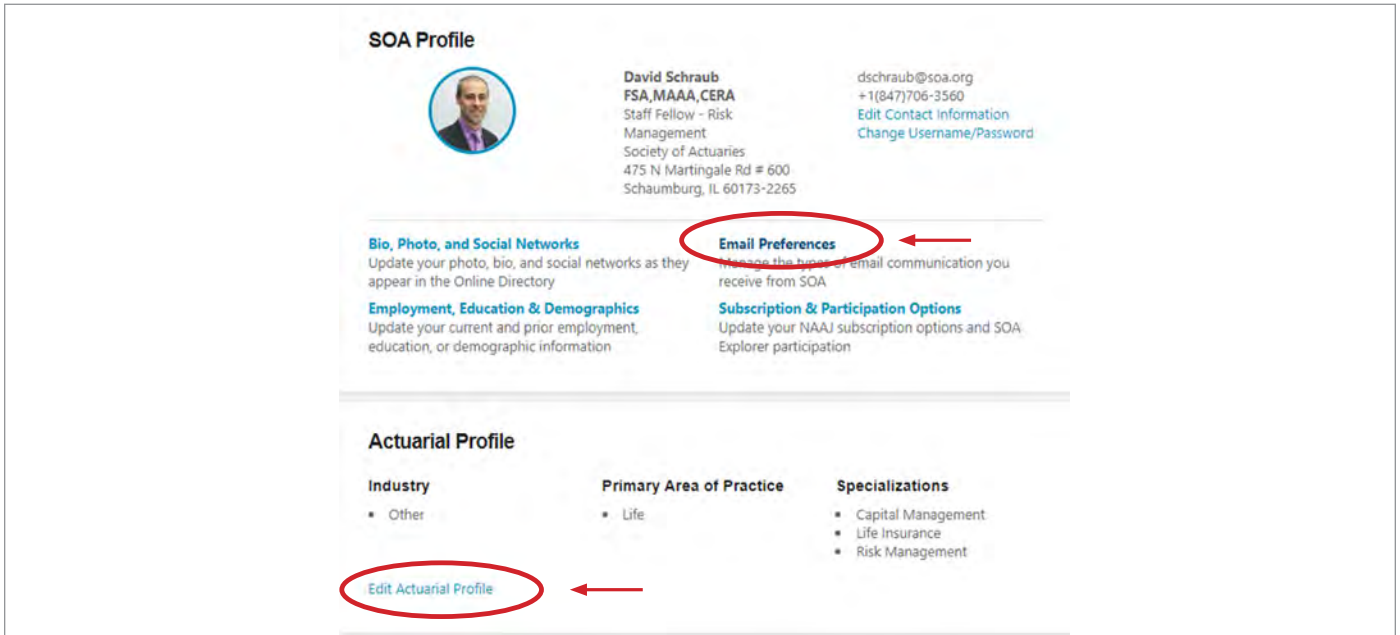
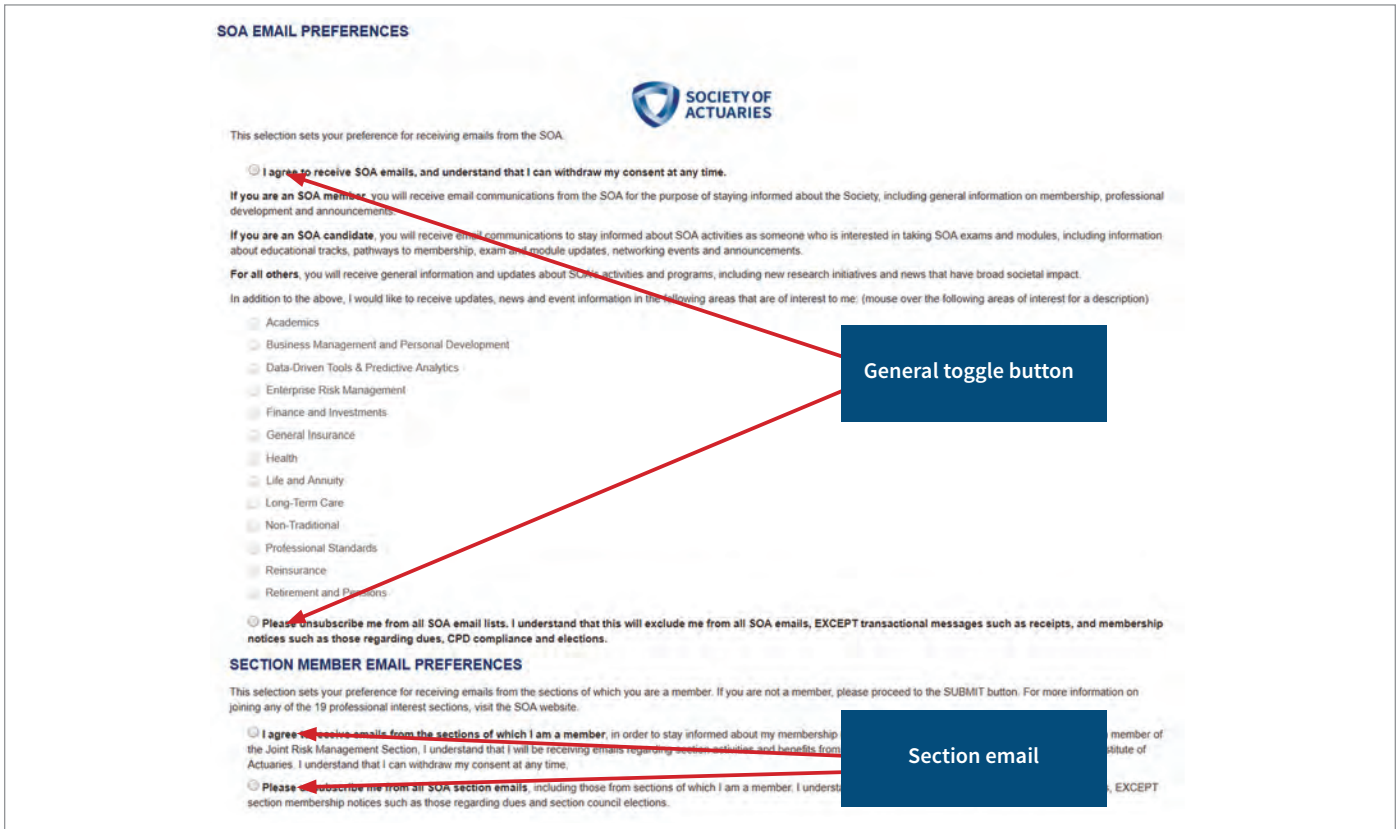
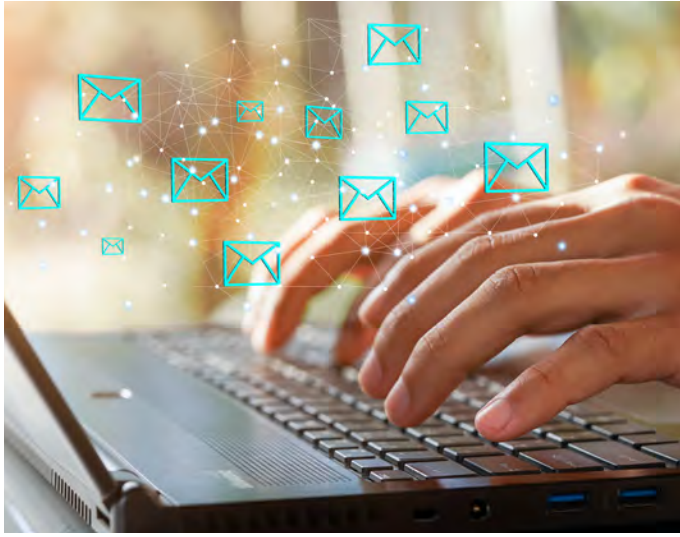


Figure 2  
How to Manage Email Preferences





If you unsubscribe from the section emails, you will still receive emails that pertain to your membership in the section.

### Actuarial Profile

Another way the SOA customizes the email you receive is based on your actuarial profile. To access your options, click on the link Edit Actuarial Profile at the bottom of the profile page (see Figure 1). You can update your primary area of practice, industry, any specialization and other information. As part of your actuarial profiles, your section membership and actuarial credential are listed but can't be changed there.

### FREQUENTLY ASKED QUESTIONS

With that foundation set, let's conclude with some frequently asked questions.

### What Should I Select If...

*I am an SOA member and I receive irrelevant SOA emails.*

The email communication is tailored to you based on your SOA profile. Please check if the area of practice listed on your profile is most aligned with your current situation. On the email preference page shown in Figure 2, you can check the areas about which you wish to receive updates.

*I am coordinating my firm's involvement with the SOA and I want to be in the loop; I participate in research and I want to be aware of any requests for proposals (RFP) in my field.*

The best way for potential sponsors, presenters or other stakeholders to ensure they are receiving all pertinent information is to go to the SOA website and create an account. For more targeted email, please fill out your email preferences.

Alternatively, you can sign up for the relevant section and ensure this section toggle is correctly set. This is one of the main benefits of being a section member.

A third option is to sign up for a [listserv](#) relevant to you.

### WHAT'S NEXT

The SOA is investigating ways to reduce the volume of email and further tailor communication to each member. We are exploring various ways to produce customized newsletters and emails to better serve members' individual needs. Stay tuned! ■



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