Auto Follow-Up

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Applies To: ■ New PoliteMail ☐ Legacy PoliteMail

Version: ☐ 4.9x ☐ 5.0 - 5.45 ■ 5.50+

The **Auto Follow-Up** feature automatically sends reminder emails to recipients who have not engaged with an original message. It helps improve read and click rates while avoiding additional messages to people who have already read or interacted with the email.

Overview

Use Auto Follow-Up when an email needs additional visibility and you want PoliteMail to resend it only to recipients who have not taken a selected engagement action.

You can configure follow-ups based on whether recipients:

- Did not open the message
- Did not read the message
- Did not click a selected link (or any link)

The criteria are inclusive: a recipient receives a follow-up only when they have **not** satisfied the selected engagement condition. For example, if you create a follow-up for people who did not click a specific link, recipients who clicked that link are excluded from the follow-up audience.

Auto Follow-Up is intended for messages such as:

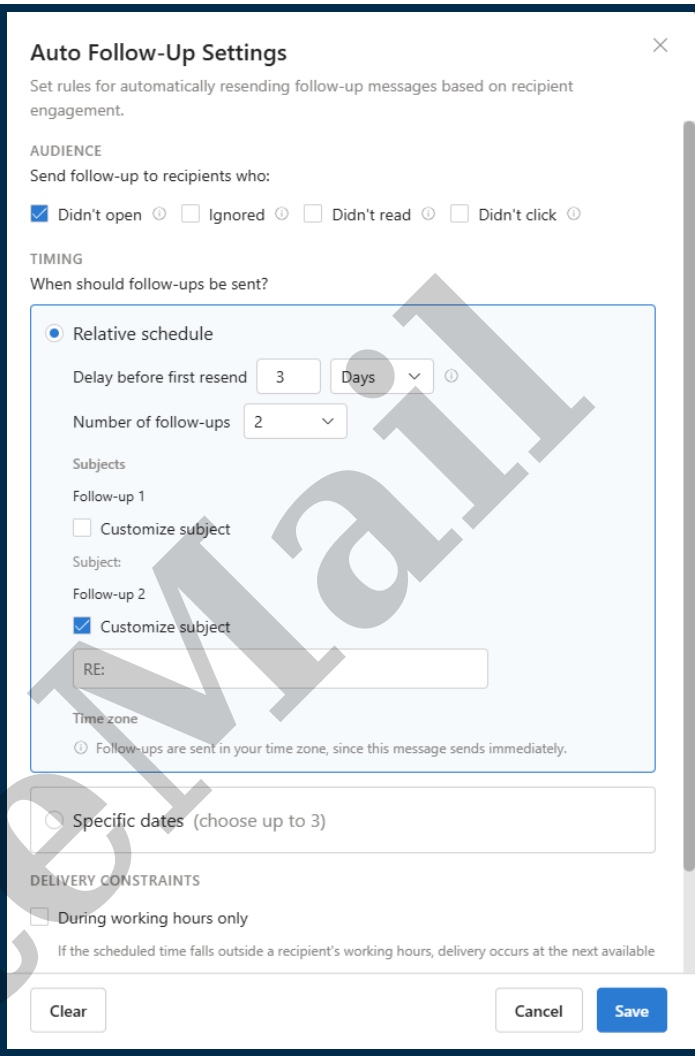
- Required policy acknowledgements
- Training announcements
- Benefit-enrollment reminders
- Internal-newsletter content with important links
- Event registration messages
- Time-sensitive operational communications

Configure an Auto Follow-Up

Configure Auto Follow-Up while creating or editing a message in New PoliteMail.

1. Create or open the message you want to send.
2. Got to **Send Options > Auto Follow-Up**.
3. Select the recipient engagement criteria for the follow-up.
4. If using click-based criteria, select the specific link recipients must click to be excluded.
5. Set the timing for the follow-up.
6. Set the total number of follow-ups to send.
7. Review recipient time-zone and working-hours settings.
8. Validate the message configuration and schedule or send the original message.

You can also set up Auto Follow-Up for an already-sent message by going to 'Auto Follow-Up' from the Metrics report.



Timing and Limits

Auto Follow-Up supports:

Setting	Behavior
Minimum interval	Follow-ups must be scheduled at least 4 hours apart.
Maximum follow-ups	A message can have up to 3 auto follow-ups.
Recipient time zone	Follow-ups can be aligned with the recipient's local time zone.
Working hours	Follow-ups can be restricted to recipient working hours.

When the original message uses recipient time-zone delivery or working-hours restrictions, the Auto Follow-Up configuration must use compatible settings. PoliteMail validates these settings before allowing the message to be sent.

For example, if the original email is scheduled to arrive during each recipient's working hours, a follow-up cannot be configured in a way that ignores or conflicts with those delivery constraints.

Recipient Selection Logic

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Each follow-up is sent only to recipients who remain unengaged according to the selected criteria.

PoliteMail reevaluates recipient engagement before each scheduled follow-up. A recipient who becomes engaged after the original message is sent, or after an earlier follow-up, is excluded from future follow-ups, preventing unnecessary reminders and reducing the chance that recipients perceive the messages as repetitive or unwanted.

Validation and Error Handling

PoliteMail validates Auto Follow-Up settings before sending. If the configuration is invalid, the system prevents the send until the issue is corrected.

Examples of invalid configurations include:

- Follow-ups scheduled fewer than 4 hours apart
- More than 3 follow-ups configured
- A required link is not selected for click-based follow-up criteria
- Follow-up time-zone settings that conflict with the original message
- Follow-up working-hours settings that conflict with the original message
- A scheduling configuration that cannot complete before the message expires

When PoliteMail finds an issue:

- The affected area of the interface is highlighted.
- An error banner, message, or dialog explains what must be corrected.
- The system does not automatically change the user's settings.
- The send is blocked until the user manually fixes the configuration. This is intentional; it ensures that the person sending the message understands and approves the final follow-up behavior rather than having PoliteMail silently alter the schedule.

Reporting and Metrics

Auto Follow-Up uses the same tracking beacons and tracked links as the original message. Engagement from the original email and its follow-ups is recorded as part of the same overall message reporting.

This provides consolidated reporting for the complete communication sequence, including:

- Overall reads and clicks across the original message and follow-ups
- Recipients who received one or more follow-up messages
- Engagement associated with each follow-up segment
- Recipients who remain unengaged after the configured sequence

Each follow-up creates a separate segment in the message report. These segments help you compare the effectiveness of the initial send and subsequent reminders.

For example, you might send a training-registration announcement to 5,000 employees. The original send may generate 1,800 reads and 600 registration-link clicks. A follow-up can be sent only to people who did not click the registration link. The report then shows the follow-up segment and the additional engagement generated by the reminder, while retaining the overall campaign metrics in one report.

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Anonymous Sends and Retention

Auto Follow-Up can be used with anonymous sends until the final configured follow-up has been sent.

After anonymization occurs:

- Follow-up settings can no longer be edited.
- Recipient-level information is no longer available.
- Metrics access is restricted because recipient data has been removed.
- No additional follow-ups can be created or changed.

PoliteMail retains the message body while scheduled follow-ups are still pending. After all follow-ups are complete, the message body is deleted when the applicable app setting does not retain it. This behavior supports data-retention and privacy requirements while ensuring that the message remains available long enough for the scheduled sequence to run.

Expiration Behavior

If a message expires before its Auto Follow-Up sequence is complete, pending follow-ups will be canceled.

When configuring Auto Follow-Up, confirm that the message expiration date and time occur after the final planned follow-up. If the message is expired early:

- Any unsent auto follow-ups are canceled.
- Recipients do not receive reminders for the expired message.
- PoliteMail should warn the sender that pending follow-ups will be canceled.

This protects recipients from receiving a reminder for content that is no longer valid or available.

Subject Lines and Message Content

In the current implementation, Auto Follow-Up resends the original message without automatically changing its subject line or content. However, a checkbox opens a field for you to customize the subject for the follow-up(s).

Best Practices

- Use Auto Follow-Up only for messages where additional reminders provide clear value.
- Use click-based criteria for messages with a specific action, such as registration, policy review, or form completion.
- Allow enough time between the original message and each follow-up for recipients to respond.
- Keep follow-up intervals at least 4 hours apart.
- Limit the number of follow-ups to what is appropriate for the message's urgency and audience.
- Match recipient time-zone and working-hours settings to the original message when those delivery controls are in use.
- Review reporting segments after the send to determine whether follow-ups improved engagement.
- Avoid using Auto Follow-Up when the original content may become outdated quickly or when repeated messages could create unnecessary recipient fatigue.

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