

SurveyOptic Employee Insights and Engagement Platform Service Definition

Executive Summary

Empower your organisation with data-driven cultural transformation. SocialOptic provides a sophisticated Software-as-a-Service (SaaS) solution, **SurveyOptic**, designed to bridge the gap between gathering employee feedback and taking meaningful action. Our platform enables leaders to move beyond static snapshots, providing real-time intelligence into engagement, health, diversity, and inclusion (DEI).

The SocialOptic Advantage

- **Modular Versatility:** Scale your support from a "Self-Service" platform to a "Fully Managed" end-to-end consultancy, ensuring you only pay for the expertise you need.
- **Actionable Insights:** Advanced workflows automate the collection of structured feedback, delivering tailored reports to stakeholders that drive immediate, evidence-based decision-making.
- **Public Sector Integrity:** Built by a UK SME, SurveyOptic is underpinned by **ISO 9001, ISO 27001, and Cyber Essentials Plus** certifications.
- **NHS-Ready Compliance:** We maintain a fully compliant **NHS Data Security and Protection Toolkit** assessment, making us a trusted partner for the most sensitive healthcare and public sector data environments.

Service Scope

SurveyOptic supports the entire employee lifecycle through:

- **Comprehensive Measurement:** Real-time analysis of stress, satisfaction, and organisational health.
- **Data Management:** Robust import/export capabilities and structured

- data handling for seamless integration with existing HR systems.
- **Accessibility:** A highly accessible interface designed to maximize engagement across diverse and remote workforces.

Onboarding: Implementation and Success

SocialOptic provides a structured onboarding process designed to transition your organisation from setup to insight in the shortest possible timeframe.

- **Kick-off and Project Planning:** We assign a dedicated success lead to define survey objectives, establish timelines, and map out your internal stakeholder reporting requirements.
- **Technical Integration:** Our team facilitates the secure import of organizational data and helps set up advanced workflows to support automated feedback collection.
- **Administrator Training:** We provide comprehensive training for "User Account" holders, covering survey design, real-time analytics, and tailored reporting features.
- **Communication Support:** We offer templates and best-practice guidance for internal announcements to maximize employee engagement and response rates from day one.

About SocialOptic

SurveyOptic is developed and operated by SocialOptic, an ISO 9001, ISO 27001 and Cyber Essentials Plus certified UK SME business operating since 2009. SocialOptic is a partner that delivers exceptional digital capabilities and provides high-quality, accessible platforms. SocialOptic builds software as a service solutions that enable people to work more efficiently and effectively, enabling them to gather, understand and communicate complex information, improving collaboration, communication and decision making.

The SocialOptic team has decades of experience in managing highly challenging, business-critical products and services, with specialisms that range from psychology to program management. SocialOptic has a wide range of public sector customers and are happy to provide testimonials on request.

SocialOptic delivers solutions using the latest web-technologies, big data and AI. The primary data centres are located in the UK, and all software development is carried out within the UK.

Service Overview

SurveyOptic goes beyond online polls and traditional surveys, to deliver strategic insight. Designed specifically for collection, analysis, benchmarking, and segmentation of online surveys, SurveyOptic is used for employee engagement, onboarding, return to work, exit, pulse, skills and 360 surveys.

SurveyOptic enables users to quickly create surveys, with a fast, intuitive, web-based interface, with a wide range of question types. Default answers, instruction text, info buttons and preset answers can be added to surveys, to enhance the end user experience, and increase the quality of collection. Surveys can be copied or used as editable templates, helping to support consistent design and re-use. A library of surveys templates is available to assist with building high quality surveys that are engaging and effective.

Surveys can be completed on a wide range of platforms and devices, with support for mobile devices from basic smart phones to the latest tablets, as well as a wide range of desktop web-browsers. The interface adapts to make use of advanced browser capabilities, to provide the best user experience.

Results can be easily segmented, benchmarked against other surveys, or overall survey results, and trends and differences identified using interactive reporting features and data visualisation. Responses can be exported for additional processing or presentation.

SurveyOptic allows real-time monitoring of responses and segmentation of response data, with the ability to share survey results in real-time in a way that is accessible from any device with a web browser.

By delivering as SurveyOptic as "Software as a Service" costs are kept to a minimum, with no need for software installation, additional servers or complex set up and configuration. New features are added with zero down-time and no interruption for users.

Key Features:

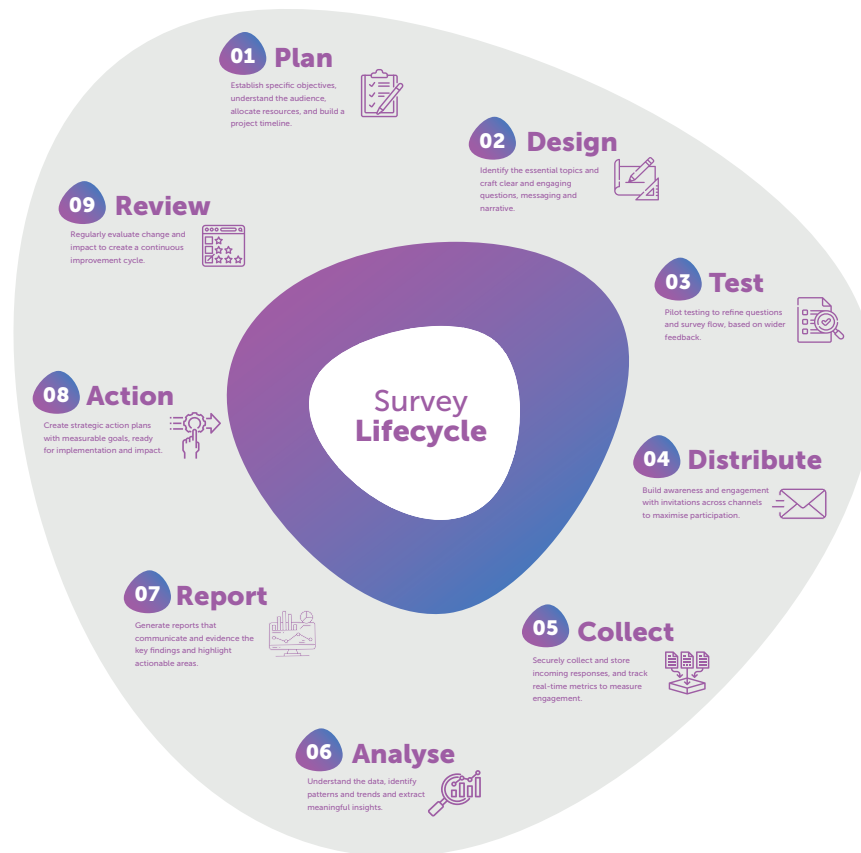
- Supports all current browsers and 99.9% of legacy browsers for survey data collection.
- Fully accessible with WCAG 2.2 support (to AA or AAA depending on theme).

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- Multilingual support and international character set support.
- No plugins or software installation required.
- High performance, low latency for maximum completion rates.



SurveyOptic supports the full Survey Life Cycle

Survey Design

Surveys are created using an intuitive web-based interface, enabling users to quickly create and edit surveys via a standard web-browser. The platform manages the full survey life cycle, with all of the features required to manage large volumes of surveys. Surveys can be created from scratch or based on previously created surveys or from a library of templates. The survey management interface allows surveys to be quickly located, by filtering by completion status or completion date, open/closed status, or using a full text title search. Deleted surveys are archived for 30 days and can be easily recovered as required.

Surveys can be manually published and closed, or set to automatically close based on total number of responses or by date, or when either of these is reached. The number of submissions can be monitored in real-time, and results are available immediately

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- Advanced role-based access control for management interface.
- Data marking for PII and sensitive category data.
- Search and filter by survey attributes.
- Close surveys manually, or automatically.

A large range of question types are available, from text and numeric inputs to likerts, grids, r-scales, NPS, CES, range sliders and multi-selection input types. As well as section headings and instruction text, questions can have supporting prompt text and information buttons to support and guide participants. Questions and answer choices can be copied from existing surveys, and question responses can be piped into other questions, allowing for text substitution in both question text and answer text. By default forms and inputs follow GDS design guidelines.

Branding and survey look and feel

Rather than providing a restricted set of style templates, none of which match your branding, SurveyOptic takes a style from a target site (for example your organisation's home page) or from your in-house style guide. This is used to exactly match your branding, with the right colour palette and the addition of appropriately used logos, typography and accents. This base template can be modified with CSS overrides by more technical users, if required. This approach ensures consistency across platforms, enhancing user trust and completion rates.

Usability and accessibility are critical, and the SurveyOptic interface make use of modern web technologies and standards to ensure that the surveys are easy to use for anyone, regardless of their mode of access.

- Fully and accurately branded survey experience to enhance user trust.
- Seamless experience from website to email to survey.
- Adapts to input device from desktop to tablet to mobile.
- Supports mouse, pen, touch and assistive input technologies.

Response Collection

Multiple collection types are supported, from fully open public (with or without preset/default answers) to named-respondent or password-protected surveys. Once a survey is created, a simple click allows sharing via copying the survey link to the clipboard, posting it to internal communications channels, sharing a QR Code or emailing a URL via a

distribution list. Any number of tracking fields can be passed through using URL parameters, e.g. location, channel, source etc. They can be passed through to a completion page, exit page or redirection link. This allows for tracking the effectiveness of communications channels.

For named-participant surveys, the system takes care of sending invite emails and reminder emails, and allows full response tracking. For all survey types, participants can pause and continue the survey later, via bookmarkable links and progressive save and session tracking. The administration interface provides a visual indication of user progress rates, enabling early identification of problem questions and survey design issues. If required, IP addresses can be tracked, and by default multiple submissions are deterred, preventing 'ballot stuffing'.

- Support for multiple collection types.
- Full response/progress tracking in real-time.
- Identify fall off rates and problem questions.

Broad platform support

Surveys can be completed on a wide range of platforms and devices, with support for mobile devices, from basic smart phones to the latest tablets. The interface adapts to make use of advanced browser capabilities, to provide the best user experience. SurveyOptic supports international character sets through UTF-8 to enable questions to be presented in a range of languages, where required.

Benchmark and compare survey results

Surveys can be used as templates, with the ability to benchmark survey results against the overall response set, or to compare survey results against another response set. Users can compare responses against previous surveys and survey averages, and visualise trends and exceptions in the results. SurveyOptic allows comparisons between different surveys, where there are common questions, allowing questions to be added or removed from surveys over time, without sacrificing the ability to benchmark, baseline or compare.

Reporting and real-time Dashboards

SurveyOptic can automatically generate and email reports, or provide them as PDF downloads. A dynamic set of reports and analysis tools are included as standard, and custom report templates can be generated by SocialOptic.

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Custom templates can include branding (logos, images, custom colour options), and additional boilerplate or logic driven text, for example detailing next steps for respondents, or giving specific guidance based on their responses or scores. The dashboard module provides editable real-time dashboards to display results, including drill down and segmentation capabilities, as well as PDF export.

Sharing Results

SurveyOptic provides an admin interface which allows real-time monitoring of responses, data export, visualisation and segmentation of user response data. SurveyOptic allows the sharing of survey results in real-time, in a way that is accessible from any device with a web browser.

Technical Requirements

SurveyOptic simply requires a web browser and Internet connectivity. No additional software or browser plugins are required. The administrative interface of SurveyOptic is supported on all modern web browsers, and for legacy browsers, it is supported with some minor visual differences. At the time of submission, the following browsers are supported for the admin interface:

- Chrome
- Microsoft Edge
- Firefox
- Safari
- Opera

Integration and data extraction or removal

All survey data can be exported as Text CSV files (comma separated variable). Exporting of data is freely available via the web interface at a user level. Data is also available via a RESTful API (Application Programming Interface) in JSON format. There is no additional cost to use the API, although extremely high-volume requests may be rate limited. SurveyOptic also supports Webhooks to allow for rapid integration with other systems including CRM, BI and Case Management tools. SurveyOptic can also integrate with payment gateways including GOV.UK Pay. The export and API enable data portability and integration between services. Deleted data is removed within 30 days of account deletion.

Information Assurance

As an organisation SocialOptic is committed to delivering quality and information security and is Cyber Essentials Plus and IASME certified. Our data centres operate to ISO9001, and have ISO27001 and ISO14001 accreditations. We continually evaluate ways to enhance and improve the security of SurveyOptic. All connections are secured using TLS (SSL) and digital certificates to provide enhanced data assurance.

Backup, Restore, Availability and Disaster Recovery

All data is synchronised to the SurveyOptic cloud, with data replicated to mirror servers in real-time, with periodic snapshots exported to back up servers. All services are mirrored, and SurveyOptic targets 99.99% availability.

Support and Service Levels

We pride ourselves on our friendly and effective customer service and support. Standard support hours are from 8am to 6pm Monday to Friday, excluding bank and public holidays. The service is available on a 24x7 basis, and monitored 24x7 via the SocialOptic service assurance infrastructure, and support requests can be raised electronically 24x7. Requests are processed within 4 hours of receipt, within office hours. Our support service includes telephone, email and web-based support for all issues and queries. Users are supported via 5 channels:

- Telephone support, available during normal business hours, voice-mail service during out of hours.
- Email, which generates a support ticket and alerts that an issue has been logged.
- Live Chat
- In-app / Web-based feedback system which generates a support ticket.
- Auto-diagnostics - the application auto-detects errors and automatically creates a support ticket on error.

Call severity will be categorised under the following three levels:

- Severity 1 – Complete loss of service affecting multiple users. Response time < 30 minutes.
- Severity 2 – Partial loss of service affecting a minority of users. Response time < 60 minutes.
- Severity 3 – Loss of service affecting individual users. Response time <4 hours.

SurveyOptic includes simple tools allowing the system administrators to carry out their own administration tasks such as adding or removing user accounts, and there is a self-service mechanism for resetting passwords.

Consumer Responsibilities

SocialOptic expects the consumer to assume responsibility for:

- All activity carried out under user accounts (and to immediately notify us of any unauthorised use, or suspected unauthorised use).
- Maintaining the security of the user names and passwords of users.
- Ensuring adequate network connectivity for the service used.
- Ensuring that a suitable web-browser is installed on administrative user systems (any major, vendor-supported browser less than 5 years old).
- Ensuring that JavaScript support is enabled, for survey editing and data visualisation.

Supplier Responsibilities

SocialOptic assumes responsibility for:

- Setting up and operating the SurveyOptic instance and infrastructure.
- Monitoring the system to ensure availability - the current system availability level is > 99.99%.
- Providing timely, helpful responses to support requests, in line with the service description.
- Recovering data from back-ups, should this be required in the event of a system failure.
- Providing the ability to export response data at the end of the agreement, or any time before.

Training

SurveyOptic has an intuitive user interface, and has been designed to require minimal training, but where required SocialOptic will work to agree any specific training requirements. This can be done by arrangement on-site, at a third party venue, or online. Our video training guides also provide supplementary training, and can be accessed free of charge. Additional training pricing is provided in the pricing document.

Ordering and Invoicing Process

Invoicing is on an annual basis. Usage is charged per billing period. Users can be added or removed via the administrator page without notice. Our standard invoicing terms are 30 days.

Termination Terms

If no longer required, individual accounts can be terminated on demand, payment will only be due for the current billing period. Bulk export of data is available on request, and user level data export is available via the normal user interface.

Offboarding: Data Sovereignty and Exit

We believe in total data portability. Our offboarding process ensures that your transition away from the service is as seamless and secure as your arrival.

- **Data Portability and Export:** Upon notice of termination, users maintain full access for a 30-day "Transition Period" to export all Content and Data in structured, machine-readable formats (e.g., CSV, JSON).
- **Secure Deletion:** Following the transition period, and in compliance with the Data Use and Access Act 2025, SocialOptic will permanently and securely purge all client data from its active systems, unless a legal retention period applies.
- **Final Certification:** We provide a formal certificate of data destruction upon request, confirming that all sensitive employee insights have been removed in line with our ISO 27001 and NHS Data Security standards.
- **Service Handover:** For "Full-Service" clients, we provide a final summary report of historical trends to ensure institutional knowledge is preserved for your next platform.

Further Information

Further information can be found at <https://surveyoptic.com/>