

Public Consultations and Citizen Experience Services Definition

Executive Summary

SocialOptic provide full service support for designing, building and operating consultations and citizen feedback using the SurveyOptic platform. SurveyOptic is an intuitive and easy to use Software as a Service (SaaS) full-lifecycle survey solution for delivering questionnaires, structured forms and polls for research, feedback, experience measurement consultations and assessments. It features advanced workflows to support experience and satisfaction measurement (including NPS) and feedback, providing insight and analysis for data-driven decision making.

About SocialOptic

[SurveyOptic](#) is developed and operated by [SocialOptic](#), an ISO9001, ISO 27001 and Cyber Essentials Plus certified UK SME business operating since 2009. SocialOptic also has a published and fully compliant NHS Data Security and Protection Toolkit assessment.

SocialOptic is a partner that delivers exceptional digital capabilities and provides high-quality, accessible platforms. SocialOptic builds and operates 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

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and AI. Our team is UK-based and the primary data centres are located within the UK, and all software development is carried out within the UK.

Services Overview

The SocialOptic Consultations and Citizen engagement and experience service is strategically designed to empower organisations to conduct effective public consultations and enhance citizen experience. SocialOptic provides a comprehensive, end-to-end solution encompassing user-friendly feedback collection, advanced analytics, and dynamic reporting tools that drive insightful reflections on citizen engagement using the SocialOptic platform.

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.



Services cover the full Consultation Lifecycle

Core Features and Benefits

- **Consultation Design and Implementation:** SocialOptic can assist in the construction and operation of public consultations along with the implementation of systematic feedback collection methods, ensuring a high standard of engagement and response.
- **Citizen Satisfaction and Experience Metrics:** Through our service, organisations can define and measure citizen satisfaction via key metrics such as Customer Satisfaction Score (C-SAT), Net Promoter Score (NPS), and Customer Effort Score (CES).
- **Strategic Survey Design:** By defining strategies across journeys, and touchpoints, SocialOptic ensures collection of data that contributes to an in depth understanding of citizen opinion.
- **Response Rate Optimisation:** Specialized tools and approaches are used to maximize response rates for surveys, resulting in richer, more comprehensive data sets.
- **Analytics and Data Segmentation:** Analytics capabilities of SurveyOptic are used to segment the data to visualize and measure impacts of changes in public service clearly.
- **Service Improvement Prioritisation:** With our advanced tools, organisations can identify 'moments that matter' and 'broken journeys', guiding priorities for service improvements and enhancements to citizen experience.

Consultation and Methodology Guidance

- Expert in-depth consultations to understand the context, challenges, and best strategies for public consultations and citizen engagement.
- Advice on selecting the most appropriate methodology and configuring the SurveyOptic platform to align seamlessly with unique requirements while integrating with existing systems.
- Comprehensive support and training to build competency in managing surveys, data collection, and analysis for ongoing consultations and citizen experience management.

Migration and Performance Assurance

- **Migration Support:** Assist in moving to a contemporary consultation platform, ensuring smooth integration and transfer of historical data, guided by best practices to minimize potential disruptions.
- **Quality Assurance and Testing:** Employ meticulous QA and testing procedures to simulate usage scenarios, including peak times, and assess system performance to avoid bottlenecks and other issues.

Training

- **Tailored Training:** Provide a diverse suite of training options crafted to the specific needs and requirements of each organisation, ranging from virtual sessions to on-site workshops.
- **Expert Guidance:** Leverage industry experts who use interactive methods to impart knowledge on product functionality, implementation best practices, and system optimisation.
- **Comprehensive Support:** Offer continuous post-training support to reinforce learning and ensure thorough comprehension and ability to address challenges.

Ongoing Support and Enhancement

- **Robust Support Infrastructure:** A proactive support system with office hours availability and 24/7 monitoring to promptly address any operational issues.
- **Continuous Improvement:** Regular deployment of updates and enhancements in response to customer needs, maintaining the relevance and efficacy of our services in a rapidly changing environment.
- **Data Security:** Maintain stringent security protocols and backup protocol to ensure data integrity even in unforeseen events, offering organisations peace of mind.

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 (via UTF-8) to enable questions to be presented in a range of languages, where required.

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 (see pricing document). Custom templates can include branding (logos, images, custom colour options), and additional boiler-plate or logic driven text, for example detailing next steps for respondents, or giving specific guidance based on their responses or scores. The dashboard module

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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 you to share survey results in real-time, in a way that is accessible from any device with a web browser.

Data Transfer

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 ISO 9001, ISO 27001, Cyber Essentials 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.

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 usernames 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

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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.

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,

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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/>