

Market Surveillance and Supplier Engagement Services Definition

Executive Summary

The SocialOptic Market Surveillance and Supplier Engagement Services offering provides a complete solution for using SurveyOptic to operate market surveillance and supplier engagement programmes. SurveyOptic is an intuitive and easy to use Software as a Service (SaaS) full-lifecycle survey solution for delivering questionnaires, data collection and structured forms. The SocialOptic team will design and build appropriate forms and workflows and support the management of data collection, including integrations with downstream systems.

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 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 and AI. The primary data centres are located in the UK, and all software development is carried out within the UK.

Services Overview

Building digital services to the exacting standards required for UK Government service delivery requires specialist expertise and experience. SocialOptic have delivered a number of services, which have been through the full design cycle and operate live data collection, including advanced integrations with GOV.PAY and GOV.NOTIFY as well as a number of CRM solutions such as Salesforce and Microsoft Dynamics.

Surveys and forms 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 and is fully accessible, meeting or exceeding all of the requirements of WCAG 2.2 and with the ability to fully follow the GDS Government Design System appearance.

SurveyOptic allows real-time monitoring of responses and segmentation of response data, with the ability to share results in real-time. 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.

Question Design

The platform interface allows forms and surveys to be quickly located, by filtering by completion status or completion date, open/closed status, or using a full text title search.

The SocialOptic team can set up features of the platform including:

- Advanced role-based access control.
- File upload and submission.
- Rules-based data validation and flow.
- Data export and API integration.
- User registration flows.

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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 respondents. Text and answer choices can be copied from existing questions, 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.

Usability and accessibility are critical, and the SurveyOptic interface make use of modern web technologies and standards to ensure that the services 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.

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 the SocialOptic team. 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 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 and 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.

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/>