

## Staff and Employee Insights Surveys Services Definition

### Executive Summary

SocialOptic provide full-service support for designing, building, operating, analysing and reporting on staff and employee surveys through their SurveyOptic software as a service survey solution. A modular approach to services enables buyers to select from an end-to-end, fully managed solution, to self-service use of the SurveyOptic platform, or any combination of services between. This means that services are available for comprehensive measurement of engagement, satisfaction, health, stress, 360 degree feedback, diversity and inclusion/DEI surveys delivering real-time insights, analytics and analysis, with tailored reports for different stakeholders to deliver data-driven decision making.

The SurveyOptic team will set up the SurveyOptic advanced workflows to support gathering measurement and feedback, providing analysis and insight for data-driven decision making. Data will be collected in a structured, actionable way, with a highly accessible interface that supports engagement. The services cover comprehensive data management, export/import, analysis and reporting.

### 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 and there is a dedicated UK support team.

## **Services Overview**

The service is not just about providing metrics—it's focused on understanding and improving the entire employee lifecycle, enhancing resource efficiency, reducing attrition, and unlocking greater employee potential for increased productivity.

### **Consultation and Customisation**

SocialOptic offer personalised consultations to understand your organisation's unique environment, challenges, and objectives. Our experts devise tailored plans to ensure a seamless fit with existing activities.

### **Onboarding and Migration**

SocialOptic provide a fully supported, smooth migration, beginning with an extensive assessment of your historic surveys and programs. Our migration strategy conforms to best practices, individualised to your requirements, and safeguards data integrity and privacy.

### **Quality Assurance and Performance Testing**

Our robust QA processes guarantee the reliability and efficiency of the SurveyOptic solution. We mimic real-world scenarios through performance testing, identifying any issues pre-emptively. Our detailed reporting includes optimisation recommendations to ensure top-tier system performance and survey engagement.

### **Training for Excellence**

Our training features different formats, including virtual sessions, on-site workshops, and self-paced online courses, coupled with post-training support. With a focus on hands-on learning and real-world applications, our training enables users to maximize the service's benefits confidently.

## Technical Requirements

To efficiently manage large datasets using our upcoming interface, a modern, supported browser and a high-bandwidth broadband connection are recommended, ensuring uninterrupted usage and streamlined data transfers.



Services cover the full Survey Lifecycle

## 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

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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 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 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/>