



Executive Summary

SurveyOptic is an intuitive and easy to use Software as a Service (SaaS) survey solution for delivering questionnaires, web forms and polls for research, consultations and assessments. It enables feedback collection, engagement surveys, tests/quizzes, NPS, customer satisfaction and 360 degree evaluation, providing insight and analysis for data-driven decision making.

About SocialOptic

SurveyOptic is developed and operated by SocialOptic, a Cyber Essentials and IASME certified UK business established in 2009. SocialOptic builds Software as a Service solutions that enable people to work more efficiently and effectively, enabling them to gather, understand and communicate information, improving collaboration, communication and decision making.

SocialOptic's team has decades of experience in managing highly challenging, business-critical products and services, with specialisms that range from psychology to program management. The primary data centre is located in London, and all software development is carried out within the UK.

SocialOptic delivers solutions using the latest web-technologies, big data and human insight.

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, customer satisfaction, market research, training, change management and many other applications.

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.

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.

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 interface 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 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

- Advanced role-based management interface.
- 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, range sliders and multi-selection input types, as well as preset questions for yes/no, true/false and net promoter score. 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.

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 Twitter or LinkedIn, or emailing a distribution list.

Any number of tracking fields can be passed though using url parameters, e.g. participant id, study id, project id, sample, cohort, media source, etc. They can be passed through to a completion page, exit page or redirection link. This allows for full support of panel providers, and tracking the effectiveness of participant recruitment.

For named-participant surveys, the system takes care of invite emails and reminder emails, and allows full response tracking. For all survey types, participants can pause and continue the survey later, via bookmark-able 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'. IP addresses can be blocked via the administration interface as required.

- Support for multiple collection types.
- Full response/progress tracking.
- 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 (via 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 losing the ability to benchmark, baseline or compare.

SurveyOptic can automatically generate and email reports, or provide them as PDF downloads. A standard 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.

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.



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, such as Internet Explorer version 11, it is supported with some minor visual differences. At the time of submission, the following browsers are supported for the admin interface:

- Chrome 22+
- Microsoft Internet Explorer 11+
- Microsoft Edge
- Firefox (current and previous 12 months' releases)
- Safari (current and previous 12 months' releases)
- Opera (current and previous 12 months' releases)

The survey responses interface supports all browsers from Internet Explorer 10 onwards, and mobile browsers from Symbian onwards.

On-Boarding and Off-Boarding

On-boarding

SocialOptic aims to make getting started with SurveyOptic as quick and simple as possible. The system runs on cloud infrastructure, located in secure, UK-based data centres, allowing capacity to be increased rapidly. To get started we just need:

- A web-ready logo image, and link to your home page (these are only required if you would like customised branding).
- An email address for the admin account (so that we can create the initial account on the system).

Logins are created instantly and both video and application tutorials are available on account creation.

The process for inviting other users to create or view surveys is straight forward, and achieved by simply entering their email address via the normal user interface.

Off-boarding

Users can delete their own accounts, or accounts can be disabled (locked) via an administrator account. Surveys and survey responses can be exported as text CSV files, or PDFs.

Our customer success team are always happy to help with on-boarding or off-boarding, and there is no charge for exporting data.



Data extraction and 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. The export and API enable data portability and integration between services. 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 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 (IE 11+ or any major 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 anytime before.
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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 via webcast. 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 a quarterly or annual basis, based on the number of users (see pricing document). 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. Complete service termination is available with 30 days notice. Should SocialOptic choose to terminate the service, at least six month's notice will be provided.

Further Information

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

