

---

ELT / PRC

# FY26 - 28 Investment plan update

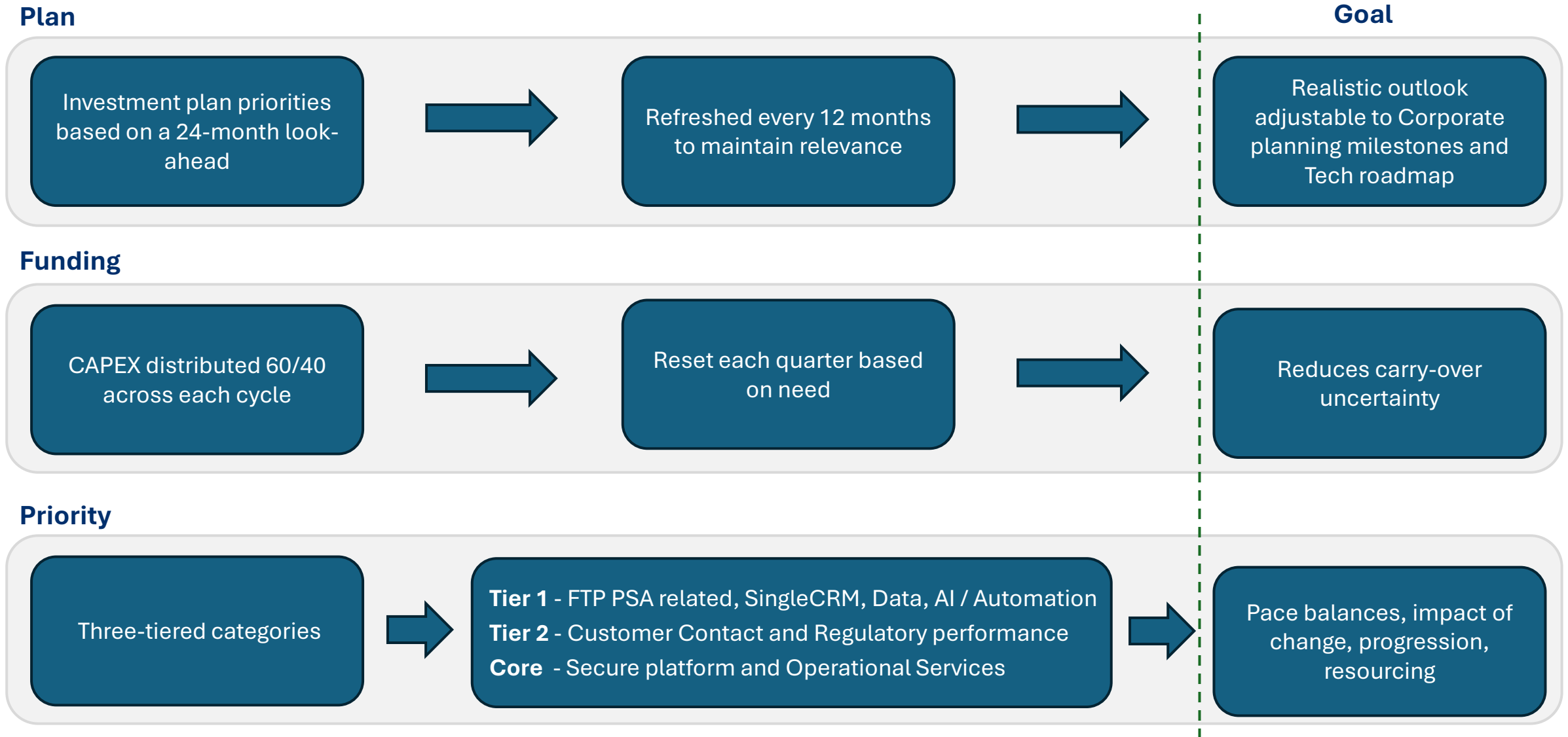
## PRC – 11 June 2026

## Topics

---

1. Approach
2. FY25/26 lookback
3. Benefits and value
4. New Quarterly priorities
5. Tech Roadmap priority linkage
6. Key Indicators
7. Governance
8. Discussion / questions

# Approach



# FY2025/26 Highlights

---

## Data and Intelligence

Jan 2025: Self Service POC | Apr 2025: HESA options research | May 2025: External data hub | May 2025: Common data dictionary | May 2025: Business Central data pipeline | Aug2025: FTP data model design | Dec 2025: Data governance framework | Jan 2026: Reg data model design | Jan 2026: Data governance manager | Jan 2026: FTP data model build

## Customer Contact

Nov 2025: Mitel replacement | Nov 2025: New strategic partner | Nov 2025: Improved reporting | Nov 2025: New Contact Centre | Nov 2025: Teams telephony

## Legal Services

Dec 2026: Research libraries | Jan 2026: Dictation | Apr 2026: Secure file sharing | May 2026: Legal team recruited

## Partners

Feb 2025: Back-payments processes | Jul 2025: New worker status contracts | Sep 2025: Partner Pensions | Oct 2025: New Payroll system

## Cyber response

Sep 2025: Implementation of Microsoft authenticator app for users of HCPC online services

## FTP Transform

Jul 2025: Nexus Frontloading workflows live | Feb 2025: Online Concerns portal | Feb 2025: Concerns EDI data captured

## Websites and Portals

Feb 2026: Website foundational layer upgraded | Mar 2026: New Search and Navigation capabilities

## Network transformation (Secure cloud network)

Apr 2026: Shared drives in the cloud | Oct 2010: New procurement partner | Maty 2026 New office firewall

## Benefits and value

Workstream	Initiatives / Deliverables	Capabilities enabled	Business value / outcomes
<b>Legal Services</b>	→ FTP frontloading FTP legal services Legal team recruited	→ Early investigations Internal legal capability Improved legal workflows	→ Reduced external legal cost Faster case handling
<b>Automation</b>	→ Digital signatures Secure file sharing	→ Faster document signing Secure information exchange Lower handling effort	→ Reduced manual effort Stronger signature governance Good data governance
<b>Access, evidence &amp; data</b>	→ Online Concerns portal EDI capture Research library Data models and governance	→ Accessible services Equality data capture Low-cost research access Data Hub	→ Better service-user access Stronger regulatory evidence Avoided research costs Data assets / good governance
<b>Partners</b>	→ 750+ partner contracts Payroll, pensions & payments Back-payment processes	→ Contract tracking (DocuSign) Payment pathway control Governance over obligations	→ Cleaner audit trail Reduced manual effort Improved operational control
<b>Customer experience</b>	→ Mitel telephony replacement Reporting updates Website & portal upgrade Secure Authentication	→ Continuity of telephony Modern portal platform Authentication & cyber protection	→ Architectural foundations Operational resilience Reduced cyber-impact exposure

# Phased plan

PROGRAMMES	FY25-26	Q1 – Q2	Q3 – Q4	Q5 – Q6	Q7 – Q8
<b>Tier 1</b>					
<b>FTP Customer Service and process improvement</b> Legal Services   PSA Standards   Process improvements	Reporting   Document sharing   Digital Signatures   Recruitment (Legal)   Research libraries	<ul style="list-style-type: none"> <li>Nexus - Reminders (Case updates)</li> <li>Frontline checks</li> <li>Training and best practices</li> <li>Case Manager Recruitment</li> </ul>	<ul style="list-style-type: none"> <li>Nexus change backlog review</li> <li>Risk Assessment workflows</li> <li>Processes</li> </ul>	Resource / scheduling /work allocation requirements	<ul style="list-style-type: none"> <li>FTP CMS Futures analysis</li> </ul>
<b>Single CRM</b> Online Experience   UK Applications   CRMs   Website and portals	Website upgraded   Search and Navigation updates	<ul style="list-style-type: none"> <li>CRM Architecture framework</li> <li>Renewals flow review</li> <li>High-level designs and roadmap</li> <li>Requirements (Info and gov CRM)</li> </ul>	<ul style="list-style-type: none"> <li>Strategic Partner Selection</li> <li>Begin CRM build                             <ul style="list-style-type: none"> <li>Applications design</li> <li>Info and gov CRM build</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>My HCPC / identity management</li> <li>Stakeholder CRM</li> <li>Applications build</li> </ul>	<ul style="list-style-type: none"> <li>Website personalisation</li> <li>HCPTS Website design</li> </ul>
<b>Data and Automation</b> Data & Intelligence   AI & Automation	Governance framework   Data sharing   BC Data pipeline   HESA options   Data quality team   Data dictionary   Data Owners   FTP, REG Data models	<ul style="list-style-type: none"> <li>FTP Data model built</li> <li>Reg Data model designed</li> <li>AI Co-pilot enablement</li> </ul>	<ul style="list-style-type: none"> <li>Self Service reporting POC</li> <li>Reg Data model build</li> <li>Azure AI POC</li> </ul>	<ul style="list-style-type: none"> <li>Direct Debit Automation</li> <li>Education Data Model (Gold)</li> <li>Self-Service reporting</li> </ul>	Self-Service reporting
<b>Tier 2</b>					
<b>Customer Contact</b> Single Contact Centre   Reporting   Operating model   Email   Webchat	New strategic partner   Mitel replacement   New phone system   Improved reporting	<ul style="list-style-type: none"> <li>Target operating model</li> <li>Voice of the Customer</li> <li>User journeys</li> </ul>	<ul style="list-style-type: none"> <li>Business process design</li> <li>Designs (people process, tech)</li> </ul>	<ul style="list-style-type: none"> <li>Cost model</li> <li>Single Contact Centre</li> </ul>	<ul style="list-style-type: none"> <li>Webchat</li> <li>Email AI</li> </ul>
<b>Regulatory processes</b> Service improvement   International Assessment   Regulatory	Partner contracts   Payroll system   Payment pathways   Redact Expert FTP   Partner pensions and back payments	<ul style="list-style-type: none"> <li>Partner KPI &amp; Quality</li> <li>FTP Final hearing listing WIP</li> </ul>	<ul style="list-style-type: none"> <li>International Assessment</li> <li>FTP Witness support</li> </ul>	<ul style="list-style-type: none"> <li>Partner / Resource work allocation requirements</li> <li>FTP Final hearing listing model</li> </ul>	
<b>Core</b>					
<b>Secure Platform</b> Modern Workplace   Cloud Network	<ul style="list-style-type: none"> <li>Secure cloud network (Core)   Portal Authentication / Cyber response</li> </ul>	<ul style="list-style-type: none"> <li>Secure Cloud network(Discovery)</li> </ul>	<ul style="list-style-type: none"> <li>Secure Cloud network (deploy)</li> </ul>	<ul style="list-style-type: none"> <li>Enterprise secure document sharing</li> </ul>	
<b>Estates</b> Facilities   Sustainability   Hybrid Office		<ul style="list-style-type: none"> <li>HVAC Phase 1</li> <li>Space planning</li> </ul>	<ul style="list-style-type: none"> <li>HVAC Phase 2</li> <li>Collaboration rooms</li> </ul>		

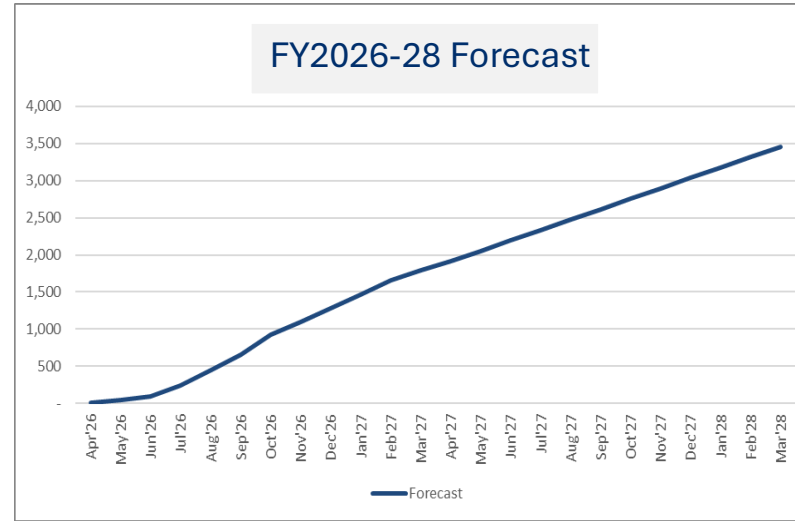
# Programme linkages to Tech Roadmap priorities (not a timeline)

PROGRAMMES					
<b>Tier 1</b>					
<b>FTP Customer Service and process improvement</b> Legal Services   PSA Standards   Process improvements	0% --- 50% --- 100% Optimise balance between internal expertise and 3rd party tech partners				0% --- 50% --- 100% Long term solution for FTP case management
<b>Single CRM</b> Online Experience   UK Applications   CRMs   Website and portals	0% --- 50% --- 100% Single HCPC CRM Platform	0% --- 50% --- 100% Single unified registrant self-service portal	0% --- 50% --- 100% Personalised website content experience providing a seamless gateway to HCPC services	0% --- 50% --- 100% Optimise balance between internal expertise and 3rd party tech partners	0% --- 50% --- 100% AI-assisted online, email and telephone support
<b>Data and Automation</b> Data & Intelligence   AI & Automation	0% --- 50% --- 100% Data Platform to provide a single source of truth	0% --- 50% --- 100% Internal self-service data and analysis tools.	0% --- 50% --- 100% External self-service data and analysis tools	0% --- 50% --- 100% End to end workflow solution	0% --- 50% --- 100% Optimise balance between internal expertise and 3rd party tech partners
<b>Tier 2</b>					
<b>Customer Contact</b> Single Contact Centre   Reporting   Operating model   Email Webchat	0% --- 50% --- 100% Omnichannel customer contact centre	0% --- 50% --- 100% AI-assisted online, email and telephone support	0% --- 50% --- 100% Optimise balance between internal expertise and 3rd party tech partners	0% --- 50% --- 100% Single HCPC CRM Platform	
<b>Regulatory processes</b> Service improvement   International Assessment   Regulatory	0% --- 50% --- 100% AI-assisted process automation and decision support	0% --- 50% --- 100% AI-assisted online, email and telephone support	0% --- 50% --- 100% Single unified registrant self-service portal		0% --- 50% --- 100% Resource management platform
<b>Core</b>					
<b>Secure Platform</b> Modern Workplace   Cloud Network	0% --- 50% --- 100% Complete Cloud migration & implement modern zero-trust secure network.	0% --- 50% --- 100% Modern Workplace Platform	0% --- 50% --- 100% Optimise balance between internal expertise and 3rd party tech partners		
<b>Estates</b> Facilities   Sustainability   Hybrid Office					

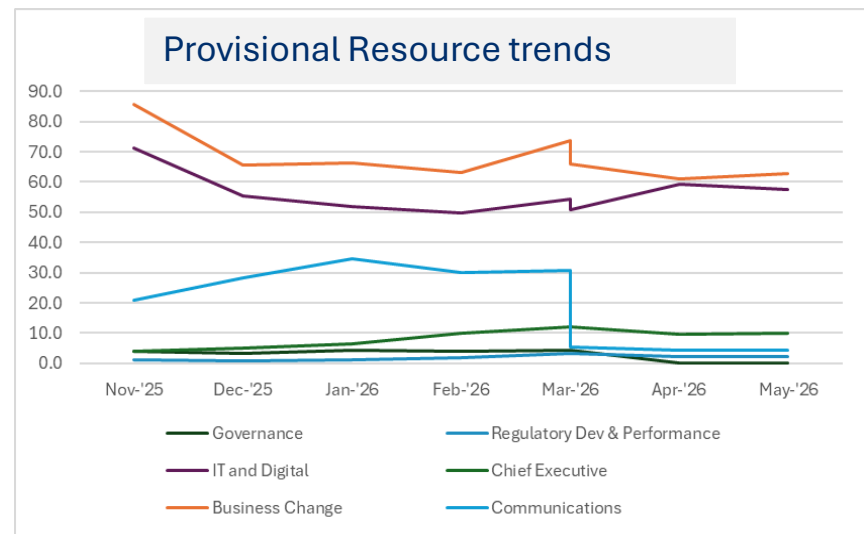
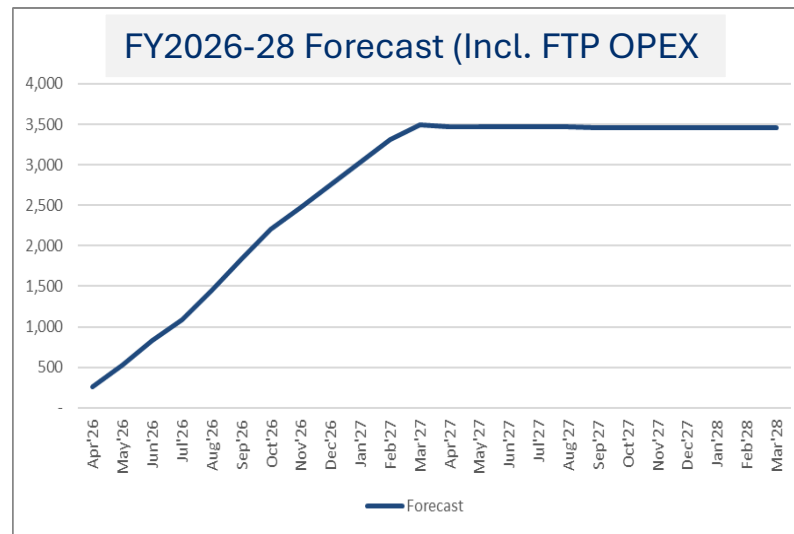
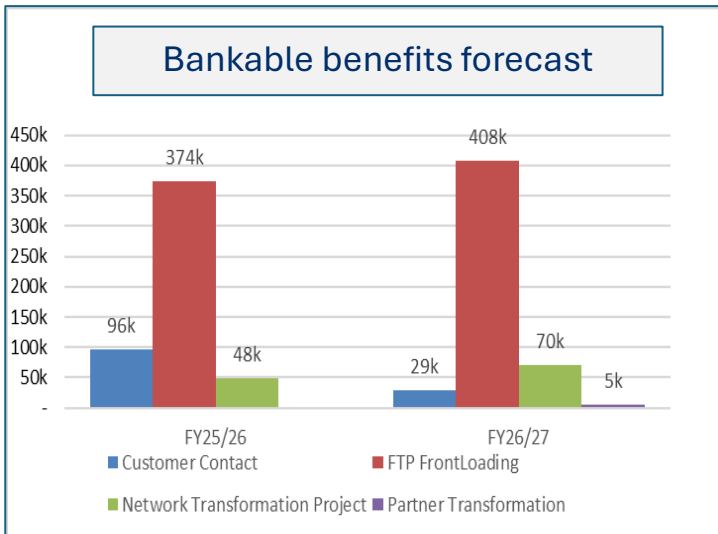
# Key indicators

Investment Areas	FY26-27 (Forecast)	FY27-28 (Forecast)
FTP CS and Process*	980	50
SingleCRM	240	190
Data and Automation	273	45
Customer Contact	135	127
Regulatory processes	405	256
Secure platform	477	-
Estates	806	-
Resources	175	75

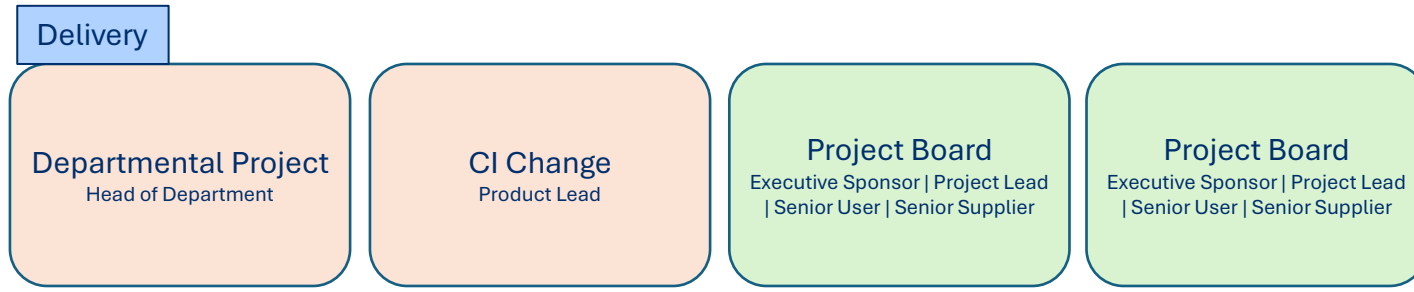
\* FY225/26 – FTP CS and Process 800K



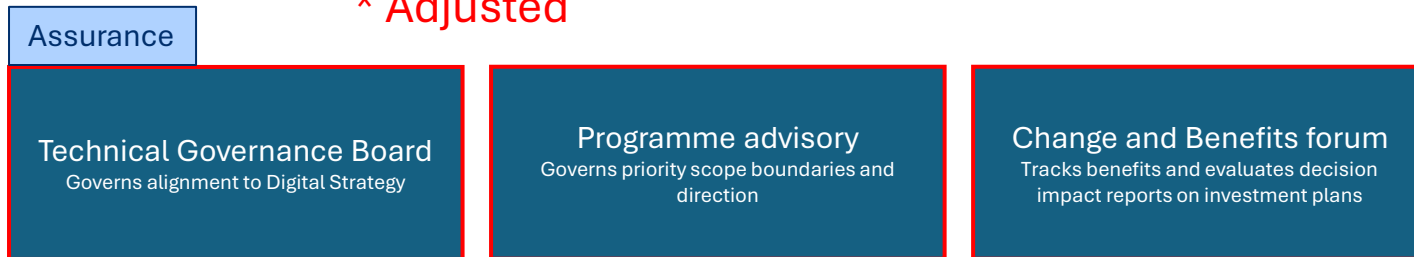
- Financial summary excludes 220K for IT CAPEX
- Benefits graph shows financial benefits considered bankable at FY start.
- Benefits are year-on-year but are shown at the point of first realisation.
- Resource trends are estimated utilisation indicators; budget provision supports backfill in technology and business change areas depending on load.
- Estates includes HVAC Phase 1 completing in June 2026
- FY26-27, FY27/28 CAPEX split will be reconsidered at the end of each quarter



# Governance layers



**\* Adjusted**



**Overview**

**Project Boards** deliver independently with the scope confirmed by the assurance layer.

**Variations** once validated by the board are **assessed by assurance layer** prior to ELT exception reporting

**Assurance** is **independent** of project boards and governance.

**Programme advisory** meets on exception or **request** as required, not a formal scheduled body.

**Primary roles**

**Technology Governance board** ensures alignment do digital strategy

**Programme advisory** reviews and validates changes to agreed scope and priority

**Change and benefits forum** validates and reports on changes and progression of benefit plans and the impact of change

**Action steps – Q1**

- Change and Benefits forum terms of reference being updated this quarter to reflect alignment with new Technology and Programme advisories.



Appendix A – optional reading only

# Detailed summaries of active initiatives

## Active project summary updates (1/2)

### Data and Intelligence

FTP data model delivery completed with validation underway; reporting proof of concept and procurement planning continue through June

#### Upcoming Milestones

- 28/05/26 – FTP Data Model build complete
- 01/06/26 – Procurement planning
- 08/06/26 – FTP Data Model validation
- 12/06/26 – Registration Model handover
- 12/06/26 – Reporting PoC workshop

#### Risks / challenges

- Budget / plan extension for Reg build
- Procurement process may delay delivery
- Funding may be required for third-party reporting

#### Outcomes

- Validated FTP and Registration data models
- Improved self-service reporting capability
- Reduced manual reporting and analysis activity
- Better insight for operational decision-making

### Customer Contact

Single contact centre operating model agreed, with detailed business, process and technical design activities progressing through Q3

#### Upcoming Milestones

- 28/05/26 – Single Contact Centre model agreed
- 30/09/26 – Contact Centre design phase
- 01/04/27 – Contact Centre implementation

#### Risks / challenges

- Embedding new operating model and staff capability
- Training required for vulnerable FTP caller support
- Clobba reporting for Phase 1 under review

#### Outcomes

- Introduction of a single contact centre model
- Improved support processes for vulnerable FTP callers
- Better operational reporting and service oversight

### SingleCRM

Project scoping and initiation preparations underway, requirement capture progressing, supplier technical review starting.

#### Upcoming Milestones

- 28/05/26 – Infor and Gov CRM workshops complete
- 01/06/26 – Tech supplier onboarding progressing
- 01/06/26 - Investment case development starting

#### Risks / challenges

- Governance dependency risk - Programme alignment workshops ongoing
- Delivery sequencing risk - Investment case and roadmap in development

#### Outcomes

- Integrated CRM, website and portal services
- Unified customer and stakeholder view
- Improved governance and customer interaction consistency

### Network transformation

Firewall implementation completed successfully, with supplier onboarding, procurement activity and contract finalisation continuing through June.

#### Upcoming Milestones

- 2/05/26 – Firewall implementation completed
- 04/06/26 – 6 Degrees kick-off meeting
- 05/06/26 – Contract signature target.

#### Risks / challenges

- Discovery and design acceleration activities under review and may impact plans

#### Outcomes

- Infrastructure resilience and security controls
- Stronger supplier onboarding and governance processes
- Better foundation for future technology delivery

## Active project summary updates (2/3)

### Partners and KPI

Quality and KPI implementation planning is underway while remaining FTP payment pathway changes continue through testing and review.

#### Upcoming Milestones

- 07/05/26 – KPI scope approved by Board
- 01/06/26 – FTP payment testing ongoing
- 30/09/26 – KPI reporting delivery

#### Risks / challenges

- Clio resource availability risk for KPI implementation delivery
- FTP payment pathway testing remains unresolved pending stakeholder review

#### Outcomes

- Improved KPI and quality reporting capability
- More reliable FTP payment processing pathways
- Better oversight of partner performance and delivery
- Increased operational visibility through reporting improvements
- ...

### Legal Services

Reporting automation, Docusign rollout and system enhancements continue progressing to support July operational reporting improvements.

#### Upcoming Milestones

- 01/06/26 – Docusign rollout under review
- 09/06/26 – Legal reporting deployment

#### Risks / challenges

- Limited team capacity slowing Docusign rollout approval
- Reporting measures currently dependent on manual workarounds
- Additional Box licensing required due to FTP recruitment growth

#### Outcomes

- Reduced manual intervention in reporting processes
- Improved reporting automation for council measures
- Increased adoption of digital approval workflows
- Improved operational capacity through system enhancements.

### Business Central

Duplicate invoicing solution development is complete and progressing through testing ahead of planned deployment in late June.

#### Upcoming Milestones

- 28/05/26 – Duplicate invoicing development completed
- 15/06/26 – Duplicate invoicing UA
- 23/06/26 – Duplicate invoicing deployment

#### Risks / challenges

- Balancing resources for UAT completion required to maintain June deployment target

#### Outcomes

- Elimination of duplicate invoicing processes
- Faster invoice testing and deployment capability
- Improved accuracy of financial reporting and controls

### Website and Portals

Phase 1 now completed and new foundational layer in place. POC for exploring build options transferred to SingleCRM. Project in closure phase.

#### Upcoming Milestones

- 1/7/2026 - Project Closure complete

#### Risks / challenges

- Project closure complete.

#### Outcomes

- Modern platform to host new services
- Improvements in search and navigation

# Technology Roadmap Milestones

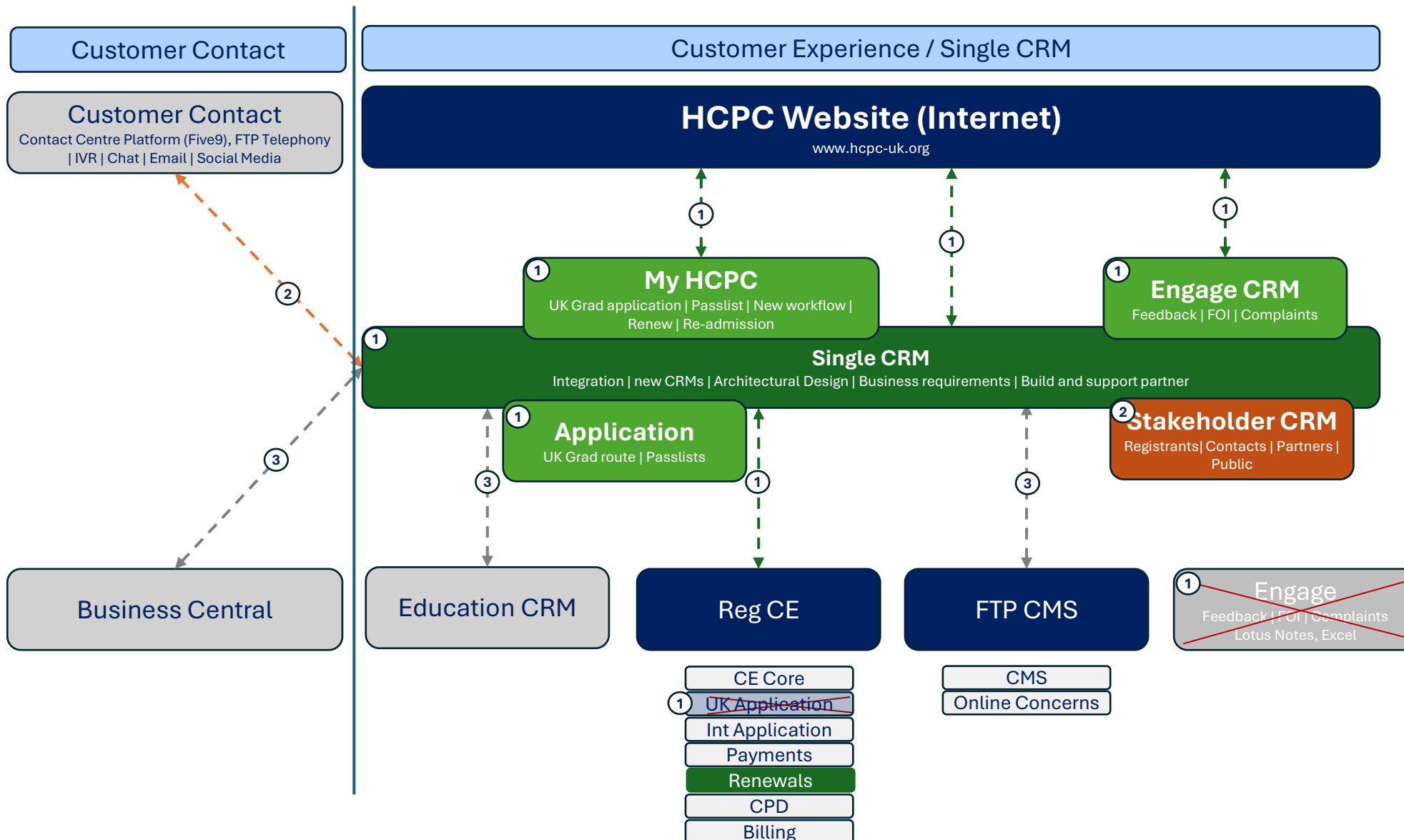
Programme	Key Milestones	Progress	Risk	Comment
Website and Portals	Upgrade website platform	C	C	Upgrade successfully went live in Feb 26.
	Ongoing enhancements to existing online user experience	G	L	Continuous improvement of website and portals in accordance with business need and user feedback
	Web-based registrant experience PoC	Hold	M	PoC descope from current website project, to be taken forward as part of new Customer Experience project.
CRM	Create foundational CRM	A	M	Slippage due to resource impact of 2025 cyber attack. Phase 1 investment case approved in Feb 26. Procurement now underway to appoint supplier for architectural review.
	Agree resource model for CRM and portal delivery	C	C	High level resourcing model agreed, will move forward as a tender process during 2026/7.
Customer Contact	Replace telephony and call handling systems with future-proof solution	C	C	Legacy telephone system successfully replaced with new future-proof solution. Phase 2 requirements now being captured.
Data and Intelligence	Enhance minimum datasets and common data dictionary	C	C	Initial data dictionary complete. Ongoing process for updates now in place.
	Build "Gold" data models to facilitate self-service reporting and analysis	A	M	Work has been commissioned to complete FTP gold model build, and options to complete the Reg gold model design and build assessed. Revised project plan being prepared for ELT review.
	Implement initial self-service reporting and analytical tools	A	M	External Data Hub established. PoC to be undertaken to help define requirements for internal users, to be commenced once FTP data model build is complete.
	Improved financial reporting	G	L	"Workday" reporting module is being implemented for financial reporting in 2026/7.
Automation	Review long term AI and automation solution options	G	L	To be assessed as part of CRM architectural review and Customer Contact phase 2.
	Develop internal workflow and automation capability	C	C	Automation Developer now undertaking changes to FTP workflows inhouse, and automated regression testing capability is now being developed to support continuous improvement of existing systems.
	AI-based redaction PoC	C	C	PoC complete and decision made to procure the preferred solution for use by FTP and Information Governance.
Security and Architecture	Decommission on-premise data centre and implement cloud-based network	A	L	Migration of all remaining key systems and data into the Cloud now complete. Slippage on cloud-based network implementation due to procurement process. A preferred bidder has been appointed, and the contract is now being negotiated.
	Implement enterprise architecture framework	A	L	Framework not yet finalised – delayed due to conflicting priorities. Impact of delay is manageable.
Modern Workplace	Design modern data sharing and collaboration capabilities	Hold	M	Commencement of POC deferred due to other critical business priorities. Interim external filesharing solution has been implemented for FTP.
	Implement Partner payroll solution	C	C	Payroll system now live.

---

Appendix B – optional reading only

# Visual alignment of SingleCRM and Customer Contact

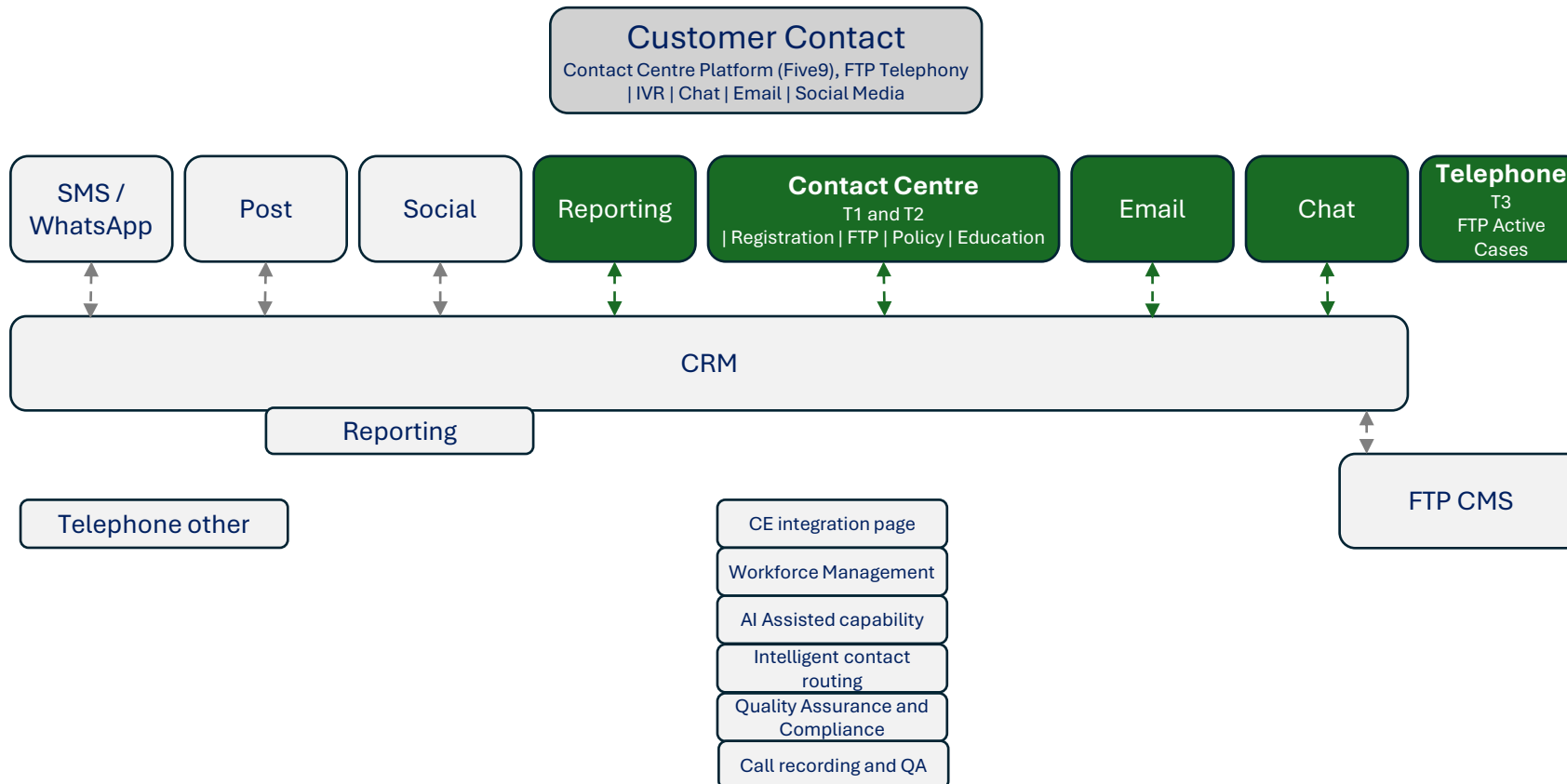
# Single CRM (Customer Experience)



- **Rename and combine** SingleCRM and Online Experience (Website and portals)
- **Integrate or build** services into CRM
- **Rebuild** components **into** the **new CRM** from integrated systems to improve
- **Priorities** for **initial** phase and then expand in **iterations**
- **Architectural** design and new dev and **support partner** relationship
- Led with **Business requirements**
- **Single CRM** an **enabling** layer
- **Design** future state **FTP CMS integration**

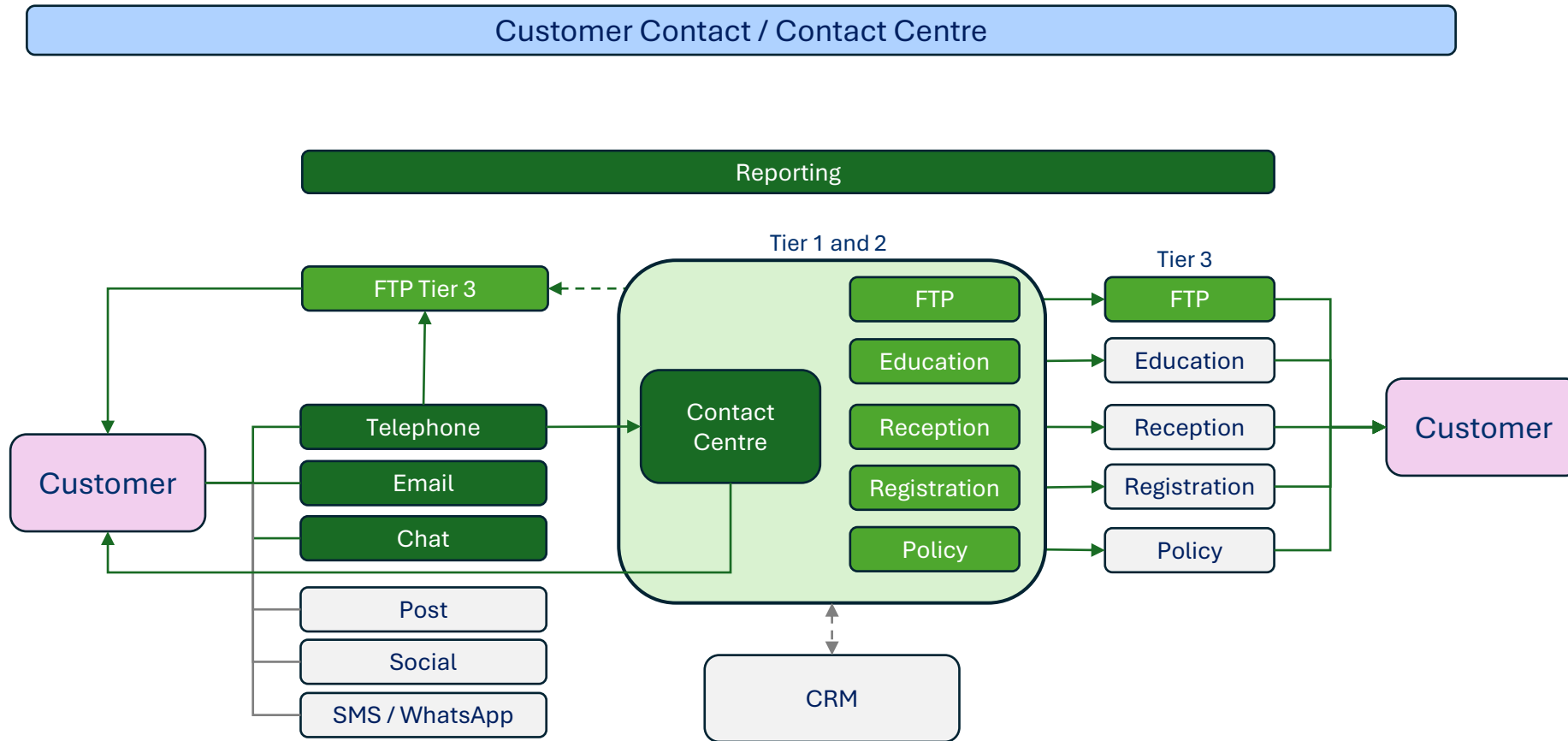
# Customer Contact Project

## Customer Contact



- **Integrate** into CRM
- **Priorities** for **initial** phase and then expand in **iterations**
- Lead with Business **requirements**
- **Active FTP** direct to Case Manager then fallback to **contact centre**
- **Active case** to **fall back** to **contact centre** after defined hops
- **Hearings** direct to hearing officers
- Use of **AI** (Chat Email)

# Customer Contact flow



- Initial **scope** ?? months in **GREEN**
- **Integrate** into CRM
- **Priorities** for **initial** phase and then expand in **iterations**
- Lead with Business **requirements**
- **Active FTP** direct to Case Manager then fallback to **contact centre**
- **Active case** to **fall back** to **contact centre** after defined hops
- **Hearings** direct to hearing officers
- Use of **AI** (Chat Email)

# FY 2026-27 Priorities

