

The 7-Step Guide to Enterprise Digital Transformation

Leadership in Digital Transformation

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Transformation is the opportunity to reimagine how an enterprise innovates, operates, and competes in the digital era. It is the moment where data becomes intelligence, people become catalysts, and decisions move at the speed of change. This guide outlines a phased roadmap to help companies build a digital-first enterprise designed to lead.



Executive Summary

In today's climate of rapid disruption and increasing customer expectations, companies that treat digital transformation as a side initiative risk falling behind. Transformation now goes beyond merely migrating to the cloud or implementing automation, it involves redefining how a business operates, competes, and evolves.

This guide outlines a practical, phase-based roadmap for becoming a digital-first enterprise. It begins by creating visibility and control over analog records and workflows and drives continuous improvement with optimization powered by intelligent systems.

Each phase is a stepping stone toward an integrated, data-driven ecosystem where agility, compliance, and customer-centricity are built into the business strategy and operating model.

Canon's approach equips leadership teams with the structure, clarity, and tools to move from isolated digital projects to sustainable enterprise-wide change. Along the way, it supports a shift from labor arbitrage to realized efficiencies through innovation.

Transformation is not a single leap; it is a disciplined evolution. By embedding digitization, automation, data accessibility, and **Document AI** into core operations, companies unlock faster decision-making, improved compliance, and the ability to respond to the market more effectively.

Transformation is not optional. It is the prerequisite for relevance.

Reframing the Foundation: A New Approach to Information Modernization

Lasting change takes hold when a company rethinks its entire operations model, reshaping every process, system, and workflow to align with a unified vision.

Across various sectors, the term ‘digital transformation’ is frequently misapplied to isolated automation initiatives, single-system enhancements, or cost-reduction measures. However, genuine transformation entails a comprehensive redefinition of business operations from end to end.

This paradigm shift is driven by data, information and efficiencies, rather than merely by software implementation. In most enterprises, critical information is scattered. It exists on paper, in siloed systems, departmental spreadsheets or trapped in legacy workflows.

These conditions prevent interoperability, obstruct automation, and keep valuable insights out of reach which paint the entire picture for the organization. Departments may operate in functional isolation, unable to collaborate or respond quickly to change.

The starting point is modernization of the enterprise’s information layer: capturing, digitizing, classifying, and connecting data assets to create a unified foundation. With structured, accessible information in place, organizations gain visibility across the entire enterprise.

Lasting change takes hold when a company rethinks its entire operations model, incorporating reshaping every process, system, and workflow to align with a unified vision. Organizations can also enable the use of intelligent tools and AI to drive additional insight and accelerate response.

Advanced services leverage machine learning and other technology to automatically and accurately extract text, paired values, tables, and structures from documents.

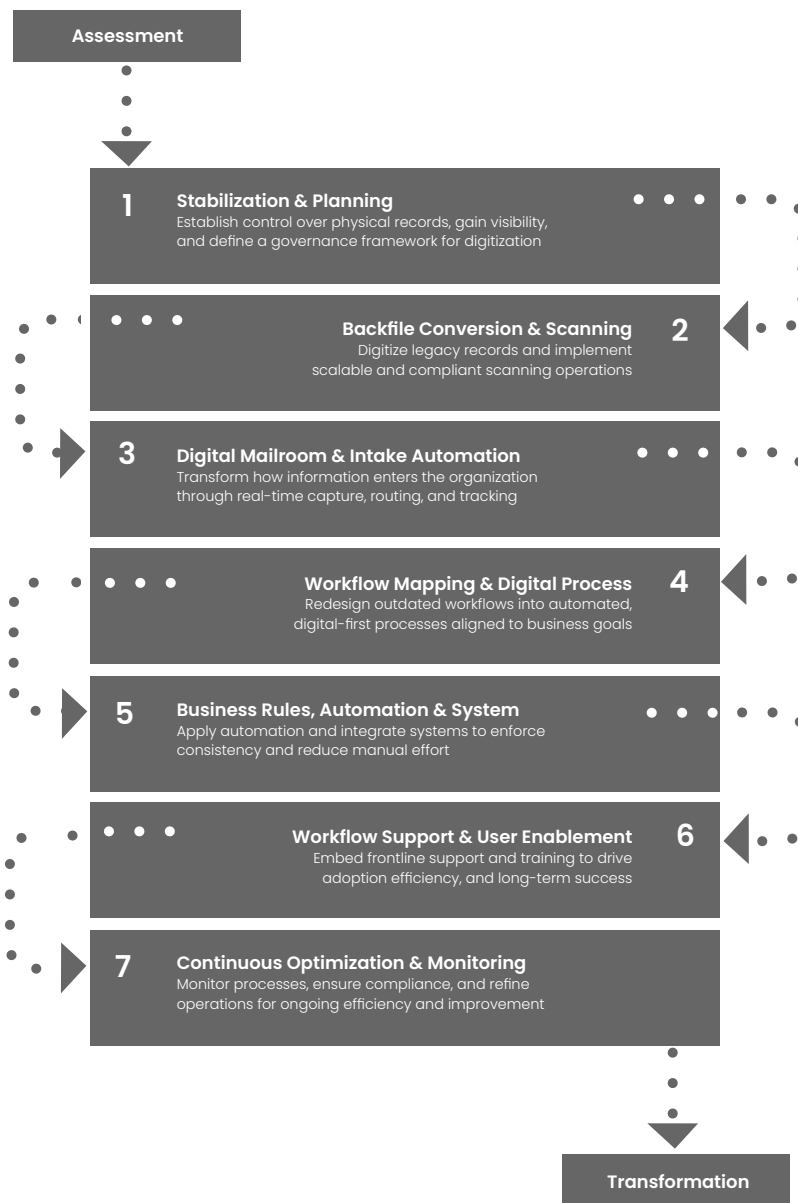
This transparency fuels customer centricity and establishes the foundation for integrated value chains and omni-channel integration.

The journey ahead is not about isolated tools, it is about designing a responsive, integrated ecosystem. It requires a disciplined roadmap, sequenced investments, and alignment across leadership.

This guide introduces that roadmap: a seven-phase approach built on real-world engagements and scalability to the enterprise. Each phase is designed to drive outcome-focused results to enable the next, culminating in a fully digitized operating model supported by a digitally-enabled workforce.

Seven Phases of Canon Digital Transformation Roadmap

This visual framework distills the seven essential phases of digital transformation into a unified, actionable roadmap. It represents more than a sequence of projects, it reflects the interdependent steps required to shift from paper-based operations to an integrated, intelligent enterprise. Each phase builds the structural and cultural capabilities necessary to operate at digital speed, scale insight, and enable a future-ready workforce.



Many companies begin their digital initiatives at the system level by simply swapping tools or adding features. But these upgrades rarely drive consequential meaningful change if the underlying operational structure remains analog, siloed or disjointed, fragmented, or opaque.

True transformation begins one layer below the systems layer: with the information itself. At the heart of every workflow, every customer interaction, every business decision, is information. But we have found that in most legacy environments, this information is trapped in paper archives, disconnected from accompanying systems, or split up in siloed departmental workflows.

As a result, systems cannot interact, leaving information partial or inaccessible. AI cannot learn and teams cannot act quickly. The first step in the transformation journey is to surface, structure, and centralize the company's information as a strategic enabler. Digitization at this level unlocks the potential for automation, omni-channel integration, and real time decision support. It becomes the fuel

for a digitally-enabled workforce and the foundation for integrated value chains. It also begins by breaking down silos by removing barriers between functions, formats, and file cabinets.

Once information is centralized and structured, it can be analyzed, shared, and acted upon to drive business outcomes. Systems start to connect, enabling AI tools to generate valuable insights.

Employees can transition from transactional tasks to judgment-based roles that enhance productivity and decision making. Many roles may evolve significantly, but this evolution brings new opportunities for growth and innovation.

In this guide, we outline the structured framework for digital transformation: our Phase 1–2–3 progression builds the digital core and extends it to processes, platforms, and people. It is designed to be scalable and grounded, as well as technical and accessible. And it keeps customer-centricity at the heart of every decision.

Information becomes true business advantage when it is structured, centralized, and integrated across systems and people.

Phase 1: Stabilization & Planning

Objective:

Establish control over physical records, gain visibility, and define scope

No digital initiative can succeed without clarity. In Phase 1, Canon helps organizations confront physical and operational sprawl that prevents digital agility. This phase provides the stabilization layer needed to move forward.

It begins with an enterprise-wide inventory of physical records that are typically scattered across departments, off-site storage, and forgotten cabinets. This isn't just a document list. It's a diagnostic tool to identify legal risks, compliance gaps, and operational blind spots.

From there, we conduct a structured audit of current workflows and pain points: who touches what, how long it takes, and where things break down.

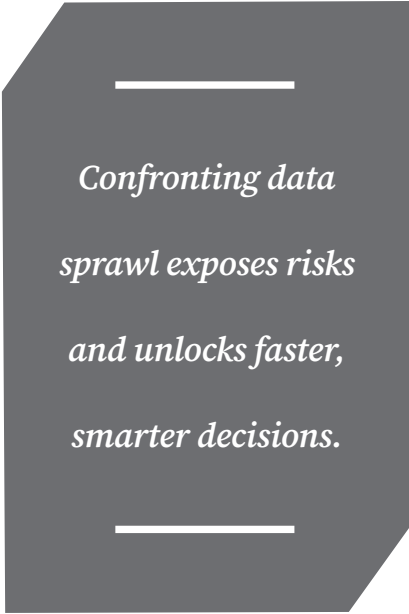
Using this visibility, we align with leadership on strategic objectives: compliance mandates, operational KPIs, and customer service goals.

This includes prioritizing use cases based on urgency, document volume, and cross-functional impact. Often, high-risk areas such as legal records, HR files, and financial documents emerge as early targets.

The outcome of this phase is a practical, prioritized roadmap. It defines not only what to digitize but why and in what order. It also establishes a governance framework to ensure digitization aligns with policy and compliance.

Critically, this is where the Phase 1–2–3 model comes into play. We begin designing a roadmap that not only supports today's digitization goals but feeds tomorrow's AI strategy.

Structured digital information becomes the raw material for AI to generate actionable insights across the enterprise.



*Confronting data
sprawl exposes risks
and unlocks faster,
smarter decisions.*

Phase 2: Backfile Conversion & Scanning Infrastructure

Objective:

Digitize legacy records and implement scalable scanning infrastructure

Once the inventory and roadmap are established, Phase 2 activates the infrastructure to execute. This involves more than purchasing scanners or selecting software. It requires a disciplined approach to digitization that ensures scale, compliance, and long-term utility.

Legacy records often span decades, formats, and risk profiles. This phase begins by designing a backfile conversion strategy that segments records by category: contracts, claims, HR files, regulatory documentation, aligning them with business priorities defined in Phase 1. The goal is to digitize with purpose, not simply scan for volume.

A secure chain of custody is implemented to manage the physical handling of documents. This includes transportation logistics, secure storage protocols, and scanning protocols designed for sensitive content.

Hardware and software are deployed at central hubs or distributed nodes, depending on geography, volume, and urgency.

Key to this phase is intelligent indexing and metadata tagging. It ensures that once scanned, digital records are not just accessible, but they

are searchable, sortable, and ready for system integration. Legal hold requirements and retention schedules are validated during digitization to ensure compliance.

The outcome is a usable digital archive, with records structured in a way that supports automation, governance, and analytics. This is where organizations begin to see the operational benefits of digitization: less paper, faster retrieval, and more control.

Canon Business Process Services' Business Processing Centers provide secure, high-volume backfile conversion and document scanning, enabling companies to efficiently digitize large volumes of legacy documents. Leveraging advanced technologies like OCR, ICR, and Intelligent Data Capture, these centers ensure accurate data extraction, compliance with regulatory requirements, and enhanced workflow efficiency. With 24x7 operations, geographically diverse locations, and rigorous security protocols, Canon delivers scalable, reliable, and confidential document conversion tailored to each client's needs.

Phase 3: Digital Mailroom & Intake Automation

Objective: Transform the front end of your information flow

While Phases 1 and 2 focus on legacy data, Phase 3 addresses the inflow of new information. In most organizations, the front door is still analog. Mail is delivered physically, scanned inconsistently, and routed manually. Digital transformation stalls unless the intake process is redesigned.

The **Canon Digital Mailroom** consolidates all incoming physical and digital correspondence into a centralized operation. High-speed scanning with optical character recognition (OCR) captures images and text in real-time. AI-powered automation

classifies each document, distinguishing contracts from invoices, claims from correspondence, and extracts key data points.

Once captured, documents are routed automatically to the appropriate department or workflow using pre-configured business rules. This reduces delays, eliminates bottlenecks, and ensures that time-sensitive materials get to the right hands immediately. Audit trails are generated from day one, supporting compliance and traceability.

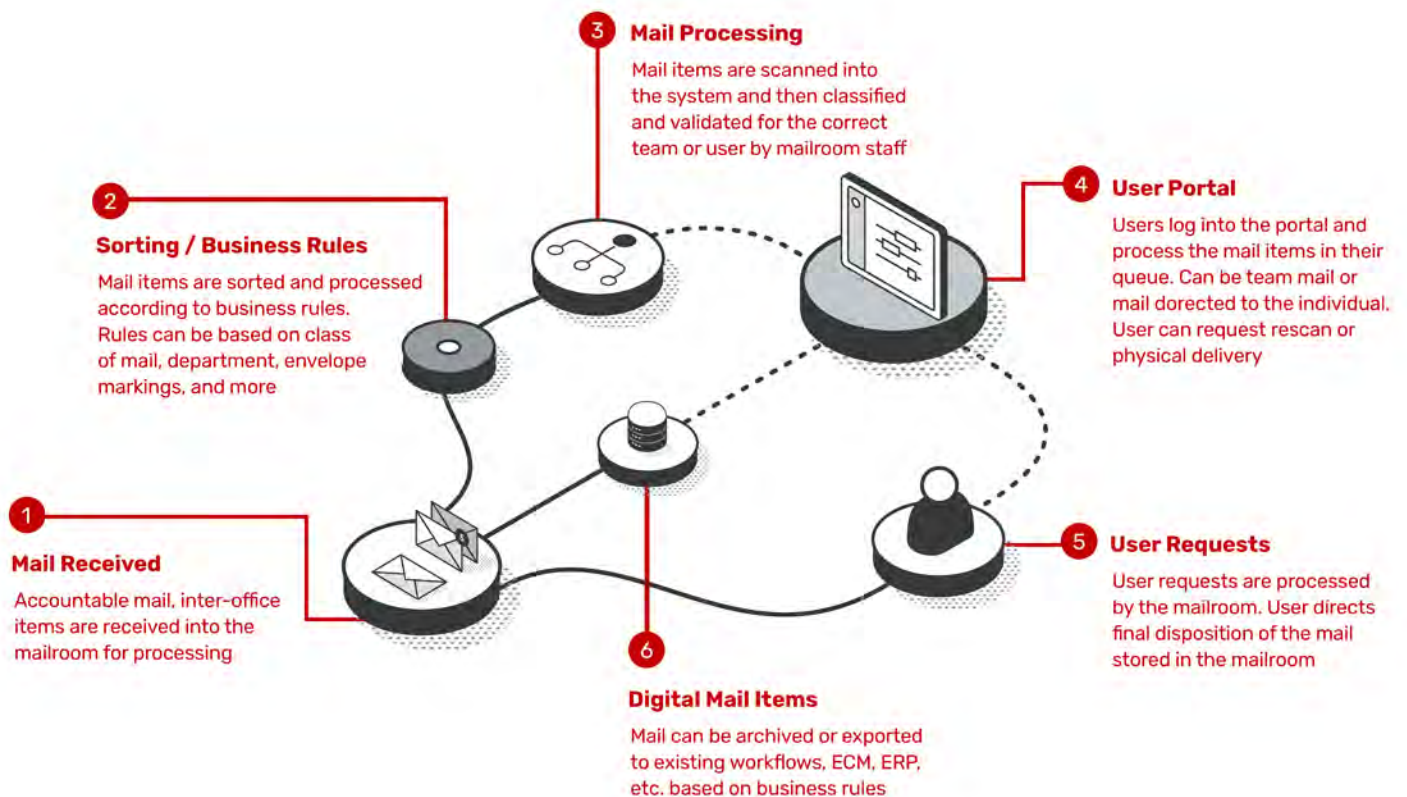
Mailroom automation turns inbound documents into instant insight.

Canon Digital Mailroom Process

Redesigning the intake process eliminates analog friction. A digital mailroom centralizes capture, automates routing, and creates audit-ready workflows

Incorporating **Canon Digital Mailroom** services as part of intake automation creates consistency. Whether content arrives by post, email, fax, or upload portal, it follows the same digital path.

This is critical for omni-channel integration and supports the larger company ecosystem by allowing unified handling of inbound communications.



Phase 4: Stabilization & Planning

Objective: Redesign legacy workflows for digital-first operations

Having digitized records and modernized intake, the next inflection point is redesigning how workflows across the organization will be powered by **Document AI** and intelligent automation. Phase 4 re-imagines processes from the ground up, moving beyond digitization into digital transformation.

We begin by mapping current-state business processes. This involves identifying every document touchpoint, approval gate, handoff, and exception path. The goal is to expose bottlenecks, redundancies, and compliance risks. Often, legacy workflows rely on a mix of emails, spreadsheets, and informal workarounds that fragment visibility and delay outcomes.

These workflows are not simply inefficient; they are barriers to agility. Phase 4 uses this diagnostic insight to design future-state workflows that reflect a digital-first operating model. Automation replaces

manual routing. Parallel approvals accelerate throughput. Exceptions are captured and escalated automatically. Governance rules are embedded at every step.



*Automation and
digital workflows
free your teams to
contribute to growth
instead of managing
processes.*

Key to this process is engagement. Business users, compliance leaders, and IT stakeholders are brought into structured workshops to co-develop new processes. These sessions not only generate better designs, but they begin the cultural shift required for adoption. In many cases, we introduce digital workflow platforms and automation tools that align with enterprise architecture.

Canon's framework supports integration with broader business processing centers, enabling embedded services in HR, finance, procurement, and IT. These

capabilities (including offshore models when appropriate) introduce scale, cost efficiency, and specialization without compromising control.

Phase 5: Business Rules, Automation & System Integration

Objective:

Automate document-driven processes and connect enterprise systems

With new workflows designed, Phase 5 focuses on execution at scale with Canon's Intelligent Automation System. The emphasis shifts to building intelligent rules, automating routine tasks, and integrating disparate systems to enable end-to-end flow.

At this stage, we configure business rules that guide classification, routing, escalation, and notifications. These rules are built into the workflow platforms and document management systems enabling consistent, traceable execution. Structured inputs from earlier phases now pay dividends, as documents carry metadata that drives automation.

Where processes are repetitive and structured, such as invoice matching, claims intake, or document validation, we introduce robotic process automation (RPA). These bots operate alongside employees,

handling high-volume, rules-based work so that humans can focus on exceptions, judgment, and customer interaction. Cognitive technologies may also be applied to further increase employee effectiveness through smart suggestions and adaptive routing.

Integration is key. Document workflows are embedded directly into enterprise platforms: ERP, CRM, ECM, case management so users don't need to toggle between systems. This creates a single source of truth and reduces administrative drag.

Security, access control, and audit logging are implemented across all systems to ensure compliance with internal policies and regulatory mandates. Before deployment, processes are tested across business units for flexibility, load, and exception handling.

Robotic process automation (RPA) handles high-volume, rules-based tasks so teams can focus on decisions and customers.

Phase 6: Direct Workflow Support & User Enablement

Objective:

Ensure long-term adoption and efficiency at the point of use

Even the most elegant digital workflows fail without front-line adoption. Phase 6 focuses on human enablement: embedding support structures and reinforcing the behaviors required for sustained digital execution.

This begins with direct workflow support. Skilled professionals, either internal or through Canon's onsite service teams, are embedded within business units to handle document intake, system navigation, exception handling, and user assistance.

Our teams serve as an extension of the digital infrastructure, bridging gaps in adoption and accelerating onboarding.

But enablement is more than staffing. We deploy tailored training programs to equip employees with the knowledge and confidence to operate within new workflows. These sessions include role-based simulations, reference guides, and hands-on walkthroughs.

Where applicable, we design immersive workshops to expose our teams to the "new way of working" where we explain redefined roles, tools, and

expectations in the digital workplace. If transformation within legacy teams is not accelerating at your desired pace, Canon can quickly deploy our highly-trained onsite teams into your workflow to amplify and accelerate your transformation goals.

Change management runs in parallel. Leaders are engaged to reinforce adoption, monitor resistance, and elevate success stories. Metrics are tracked across key performance indicators: turnaround time, exception frequency, workflow adherence, and user satisfaction.

Many roles evolve in this phase, with automation absorbing transactional work and employees shifting toward analysis, coordination, and customer experience.

This evolution supports the broader goal of creating a digitally-enabled workforce—one that is resilient, adaptive, and focused on value creation.



*Digital workflows
succeed when people
are given training and
individual support,
not just new process.*

Phase 7: Continuous Optimization & Compliance Monitoring

Objective: Sustain and scale the transformation

Digital transformation doesn't end with go-live. Phase 7 ensures the organization continues to evolve, optimizing operations, extending capabilities, and reinforcing compliance.

Canon implements real-time dashboards and analytics tools to monitor workflow performance across the enterprise. These portals track volume, processing times, user activity, and exceptions. Business intelligence tools identify friction points and opportunities for improvement. Feedback loops from end-users supplement the data with lived experience.

Compliance is actively managed. We conduct internal audits to validate retention policies, access controls, classification accuracy, and regulatory adherence. This ensures that new digital processes

not only function efficiently but meet all legal and governance requirements. Audit trails and reporting functions simplify both internal and external reviews.

Machine learning can now be layered onto the system. These models analyze document classifications, processing outcomes, and exception trends to continuously refine accuracy and efficiency. Over time, this intelligence reduces rework and expands automation opportunities.

Most importantly, this phase supports scalability. With a strong digital foundation in place, the organization can extend transformation into new document types, departments, or geographies. Adjustments to business rules and routing logic are made as regulations evolve or strategic goals shift.

The right foundation paves the way for reduced errors, efficient teams, automated scaling, and accelerated business growth.

Conclusion: A Framework for Long-Term Advantage

Digital transformation is not a technological upgrade; it is a redefinition of how the business operates and delivers value. This roadmap positions enterprises to responsibly leverage **Document AI** for predictive insights and next-generation efficiency. The seven-phase framework outlined in this guide provides a structured, scalable approach to modernization. It bridges the gap between analog complexity and digital agility, unlocking visibility, speed, and intelligence across the enterprise.

By prioritizing information as the foundational layer, and sequencing digitization, automation, and integration in a deliberate manner, companies build not just efficiency but strategic advantage. Each phase is designed to reinforce the next, creating a cumulative impact across compliance, cost structure, customer responsiveness, and competitive positioning.

Canon's roadmap is not theoretical. It is actionable. It shows how to move from labor arbitrage to real innovation, from fragmented silos to an integrated ecosystem. It prepares the enterprise to respond faster in the market, leverage cognitive technologies effectively, and foster a workforce capable of thriving in the digital age.

Above all, it reminds leaders that transformation is not about chasing trends. It is about building resilience, clarity, and capability so the organization can lead with confidence in a new business landscape. The most competitive organizations are designed for change driven by insight and aligned around the customer.

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About Canon Business Process Services

Canon Business Process Services is a managed services and digital transformation leader focused on building innovative end-to-end solutions that enable business growth, operational excellence, and business agility. Backed by Canon's global reputation for quality and innovation, the company helps clients improve workflows, optimize costs, and achieve long-term success. We do this by combining onsite workforce management and logistics expertise with analytics, technology, and automation. We are honored to be recognized as a Global Outsourcing 100 leader by the IAOP for 19 straight years with strong teams across the US and in the Philippines. Canon Business Process Services is a wholly owned subsidiary of Canon U.S.A. Learn more at cbps.canon.com.