

salesforce

Workforce Innovation Playbook

The 4Rs to Building the
Human + Agent Workforce



INTRODUCTION

Guide to Human + Agent Collaboration

We're in the biggest workforce transformation of our lifetime as we unlock the power of agent and human collaboration.

This requires a new way of working. Agents are not about replacing people, they are releasing us from the routine, the bureaucracy, the noise – and augmenting human productivity, creativity, and purpose.

In this critical leadership moment, it's important to be guided by values and bring everyone along.

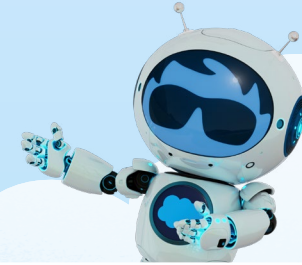
In this playbook, we outline the 4Rs to building a workforce that's agentic by design:

- ✦ **Redesign** how work gets done
- ✦ **Reskill** your people
- ✦ **Redeploy** talent to unlock agility
- ✦ **Rebalance** human + agent work

Let's explore the mindset, steps, and tools to elevate the human experience.



Some Definitions Before We Get Started



Agentforce

Agentforce is the agentic layer of the Salesforce Platform for building and deploying autonomous AI agents across any organizational function. What makes it powerful is its ability to operate autonomously, and then seamlessly hand off to humans when needed. You can integrate any required business knowledge into Agentforce, ensuring it executes tasks precisely in line with its assigned role.

Agentforce Command Center

Manage, optimize, and scale your hybrid workforce. The command center allows you to visualize, track, and optimize how AI agents enhance human productivity.

AI

Artificial intelligence (AI) is the broad ability to have machines think and act like humans in processes like learning, reasoning, and problem-solving. Think of AI as a tool that can analyze data, make decisions, and perform tasks that would normally require human input.

AI Agents

AI agents are a type of artificial intelligence (AI) system that can understand and respond to customer inquiries without human intervention.

Automation

Using technology to perform tasks with minimal human intervention, aiming to increase efficiency and consistency across various business processes. This includes automating repetitive administrative tasks within sales, service, and marketing, often leveraging AI to free up human staff for higher-value activities.

We're in a Defining Moment

In this new era of agent and human collaboration, we must reimagine the employee experience to unlock bold, creative, purpose-driven work.

14%

of new jobs will result from macro trends and new tech*

39%

of workers' core skills will change*

59%

of the global workforce will need reskilling*

11.6M JOBS

Net gain between 2022 and 2028**

\$2.02 TRILLION

Business revenue between 2022 and 2028**

In the news:

“ Marc Benioff says that from now on **CEOs will no longer lead all-human workforces** – enter the new era of AI coworkers

“ **AI Agents Are Your New Coworkers**

“ **Fear Isn't Slowing Down AI Adoption at Work. A Lack of Vision Is**

“ **AI is everywhere, including HR – but these 'human' skills will always be critical**

Is your workforce prepared?

* Future of Jobs Report 2025; By 2030

** Salesforce-sponsored IDC report

Building an Agentic Mindset

1 Learning is the new meta-skill

The demand for skills will continually change and evolve. Give employees the space to learn, ask questions, and evolve key skills. Use [Trailhead](#), Salesforce's online learning platform to learn human, agent, and business skills for the agentic enterprise.

2 Use AI tools in the flow of work

The best ways to bridge confidence gaps with AI and agentic technologies is to simply get started. Integrate agents and AI into the flow of work with integrated teammates like Agents in Slack.

3 Build trust

Workers who use AI daily are twice as likely to trust AI agents, reinforcing a clear link between hands-on use and confidence. Engage employees in change and empower them to experiment.

4 Show the impact

Help employees understand the "why", which becomes easier to demonstrate as you integrate the tools and drive adoption. In our [recent research](#) we found daily AI users report increased productivity (64%), focus (58%), and job satisfaction (81%).

Be an Agentblazer!



10 Skills of the Future

Human Skills

Adaptability
Accountability
Collaboration
Emotional Intelligence

Agent Skills

Agent and AI Literacy
Human-Agent
Collaboration

Business Skills

Problem Solving
Data Interpretation
Creative Thinking
Storytelling

[Learn more](#)

Stages of Human & Agent Work

1st

Specialized Contributors

AI Agents mastering specific tasks with speed and accuracy, transforming business operations.

We are here

2nd

Collaborative Multi-Agent Systems

AI teams - comprised of both AI agents and humans working in synergy - collaborating, adapting to context, and tackling complex workflows across industries.

3rd

Enterprise-Level Orchestration

Roles shifting to managing and guiding AI-driven business systems.

“The future isn’t about humans versus AI – it’s about humans with AI working in concert, each using their unique strengths.”

– **Silvio Savarese**
EVP, Chief Scientist



4Rs

Building the Human + Agent Workforce

Redesign how work gets done.

Build the human and agent workflow.
Augment human judgement and creativity
with AI speed and scale.

Reskill your people.

Equip employees with the skills needed
to guide, lead, and scale with agents.

Redeploy talent to unlock agility.

Move beyond static roles to enable people
to flex, adapt, and focus on high
impact work.

Rebalance human + agent work.

Orchestrate the right partnership between agents and
humans to ensure each does what they do best. Know
the outcomes with tools, such as Agentforce
Command Center.*

Agentforce
Command Center 



GOAL

Redesign

how work gets done. Build the human and agent workflow. Augment human judgement and creativity with AI speed and scale.

Foundational Data:

Job descriptions, task data, AI roadmaps (or tools that may be available), future of work research.

What It Is:

A breakdown of roles into individual tasks, identifying which can be automated and which require human expertise.

Key Tools:

Tableau, Slack, Claude & Gemini AI

Why It Matters:

It helps identify and automate tasks that drain time, so employees can focus on higher-value work.

TIP: Start small! Pick a common job to break down into tasks, and then think through which tasks are suited for humans or AI.

Checklist/Steps

1. Identify Tasks for Automation

- ☐ Break roles into tasks (the jobs to be done)
- ☐ Use **AI tools** to define which tasks are best suited for automation (repeatable, time-consuming, etc.)

2. Prioritize Automation Opportunities

- ☐ Focus on automating tasks that provide the greatest productivity gains. Not everything needs to be automated

3. Redesign Roles for AI Collaboration

- ☐ Define roles where employees work alongside AI to enhance performance. In some cases these may be totally new roles, and in others the existing role is augmented

4. Test & Validate the New Role Design

- ☐ Pilot new roles with stakeholders and gather employee feedback, test on a small group

5. Implement, Refine

- ☐ Scale the redesigned roles across the organization, refining based on feedback

The Top 5 AI Driven Tasks We Can Automate

1. Update reference materials for knowledge base
2. Support system maintenance
3. Track and report metrics
4. Conduct statistical analysis
5. Produce updates on industry news and trends



CASE STUDY

Redesign

how work gets done. Build the human and agent workflow. Augment human judgement and creativity with AI speed and scale.

The Opportunity

Customer support engineers spent most of their time on simple, repeated inquiries.

What We Did

Redesigned their role to focus on solving complex issues, building deeper customer relationships, and driving long-term value while an agent handles routine inquiries and tasks.

The Result

1 Million Support Requests Handled by Agentforce. By answering routine and repetitive support questions, Agentforce is freeing up our support and success teams to focus on what they do best.



**Customer
Support
Engineer
+
Service
Agent**

Customer Support Engineer

Refine role to handle more complex cases, synchronous work, and provide consultative dialogue with customers

Service Agent



Support less complex cases, provide frontline customer support



GOAL

Reskill

your people. Equip employees with the skills needed to guide, lead, and scale with agents.

Foundational Data:

Leverage a skills architecture.

What It Is:

Identifying the skill gaps between existing employee skills and future role requirements. Then using these gaps to inform training programs addressing both enterprise-wide and job-specific skills.

Key Tools:

Skills LLM

Why It Matters:

Offers personalized learning and resources to prepare employees for future roles.

TIP: There is great content on [Trailhead](#) that can be leveraged to upskill on AI - such as Agentblazer Champion and Innovator Status trails.

Checklist/Steps

1. Use AI to Develop a Skills Ontology

- ☐ Use AI tools to analyze job descriptions, performance reviews, and industry trends to define a skills architecture
- ☐ Map current employee skills to this architecture using skills LLMs or internal data

2. Identify Skills Gaps

- ☐ Assess current skills against future role requirements
- ☐ Identify gaps in emerging skills and job-specific competencies

3. Prioritize Reskilling Opportunities

- ☐ Prioritize automation opportunities based on the most impactful skills for the enterprise by focusing on skills critical for business transformation and growth

4. Design Reskilling Programs

- ☐ Develop programs to address both current job needs and emerging skills. Focus on job-specific competencies and broader enterprise skills

5. Implement Reskilling Programs

- ☐ Launch training based on prioritized skills. Provide continuous learning resources and support

Become an Agentblazer
Reskill with Trailhead!



CASE STUDY

Reskill

your people. Equip employees with the skills needed to guide, lead, and scale with agents.

The Opportunity

Reskill Customer Support Engineers to lead in the agentic enterprise.

What We Did

Identify the skills needed for support engineers to move into a new, consultative role with customers and trained them.

The Result

Customer Support Engineers have new skillsets to support a critical new role for our customers.



Activating the Future with Forward Deployed Engineers

Customer Support Engineer Skills

Customer Service

Troubleshooting

Software Documentation

Disaster Recovery

Enterprise Architecture

Forward Deployed Engineer Skills

Consultive Skills

Requirements Gathering

Agentforce Delivery NEW

API/Web Services NEW

 Data Cloud NEW

Training Methods

Virtual Learning

Live Workshops
AI Learning Day

Mentoring Programs

GOAL

Redeploy

talent to unlock agility. Move beyond static roles to enable people to flex, adapt, and focus on high impact work.

What It Is:

A strategic process to identify and redeploy employees into growth areas, leveraging their existing skills and institutional knowledge.

Key Tools:

Salesforce uses Career Connect, our internal skills and talent matching platform.

Why It Matters:

Retains valuable talent and reduces hiring costs. Democratize access to skills and experiences. Preserves institutional knowledge.

TIP: Get leader buy-in early. Aligning on the value of redeployed employees facilitates a smooth transition for employees and their receiving org.

Checklist/Steps

1. Identify Candidates & Conduct Skills Analysis

- ☐ Analyze skills and career pathways to match talent to opportunities once you have identified redeployment opportunities

2. Secure Position & Match Skills

- ☐ Match employees to roles based on skills and experience (supported by Equality and Legal reviews)

3. Align & Enable Leaders on Process

- ☐ Align leadership on their role in the transition and the potential benefits of redeployed employees

4. Prepare Notifications & Deliver Offers

- ☐ Deliver employees letters with redeployment details and exciting opportunity to take a new role

5. Redeploy & Reskill Employees

- ☐ Provide redeployed employees with individualized training, on-the-job experience, and continuous improvement opportunities



CASE STUDY

Redeploy

talent to unlock agility. Move beyond static roles to enable people to flex, adapt, and focus on high impact work.

The Opportunity

With demand for fewer support engineers, we needed to match them to new roles that could utilize their institutional knowledge.

What We Did

Utilized Career Connect, our internal talent matching platform, to find relevant roles for them.

The Result

Redeployment for SEs into new roles that allow us to retain talent and use their skills elsewhere in the company.



Customer Support Engineer Possible Career Paths



**career
connect**

Career Connect AI matches talent to key areas around the company based on skill and experience matching.

REDEPLOY DEEP DIVE

Career Connect: AI-enabled Talent Marketplace

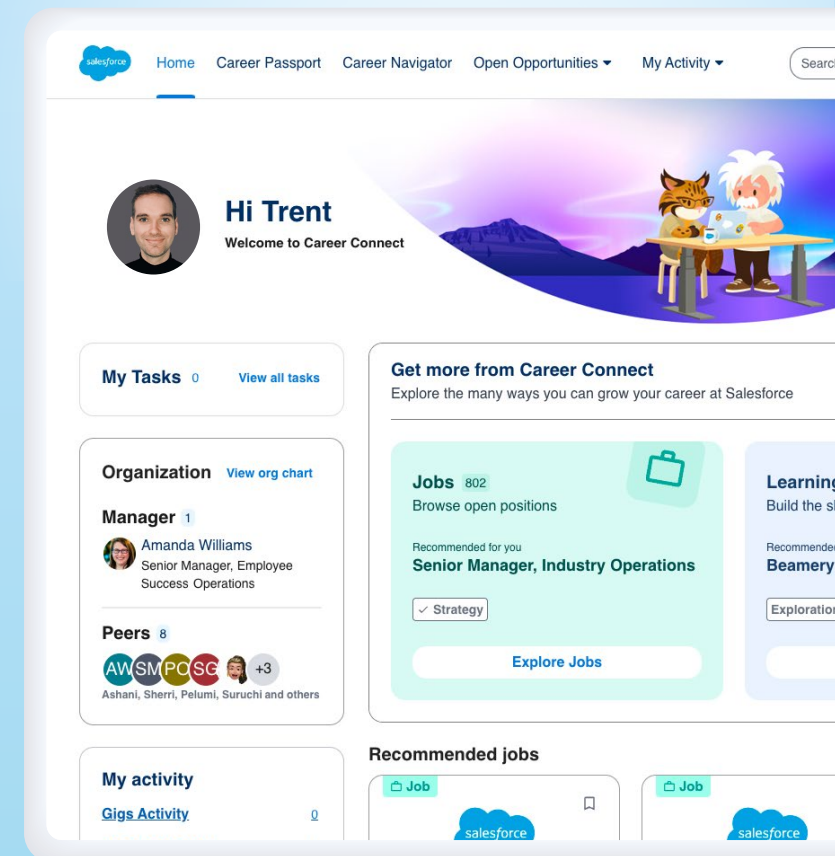
Career Connect is our internal talent marketplace, which enables us to reskill and redeploy our workforce for the AI-driven future.



What it Does

Leverages AI to match employees with relevant learning content and job opportunities, recommend personalized career paths, and help them develop and track their skills. It also provides managers with visibility into their team's career development and helps hiring managers identify top internal talent.

What it Delivers

**Talent Visibility****Personalized Career Paths****Seamless Talent Mobility**



GOAL

Rebalance

human + agent work.

Orchestrate the right partnership between agents and humans to ensure each does what they do best.

What It Is:

A dynamic process to manage and visualize your augmented employee and agentic workforce. Measure and optimize for human agent collaboration.

Key Tools:

Agentforce Command Center, Tableau, and workforce planning tools to measure task and workforce data.

Why It Matters:

Agent's capabilities are always changing, so we need to continuously reassess the human-agent labor mix. This approach will improve efficiency, customer service, and employee engagement.

TIP: Clearly define success metrics for your rebalancing efforts. You can't optimize your workforce without precise definitions of what success looks like; whether it's cost saving or improved customer satisfaction.

Checklist/Steps

1. Map Your Current Workforce & Workflows

- ☐ Understand how tasks aligns to processes and existing operating models
- ☐ Establish baselines for current human vs AI task distribution

2. Define Your Rebalancing Objectives

- ☐ Establish clear, measurable goals (ex. target time savings, cost reductions, service improvements, faster growth)
- ☐ Align goals with your business strategy

3. Measure & Optimize Digital Agent Effectiveness

- ☐ Track digital agent performance (accuracy, speed, human intervention needed)
- ☐ Evaluate digital agents' impact on human workloads, workflows, and engagement models and refine agent capabilities based on data

4. Realign Human and Digital Roles

- ☐ Adjust task allocation between employees and digital agents based on performance
- ☐ Redeploy employees to high-value tasks
- ☐ Adjust operating and engagement models based on realignment

5. Continuously Improve and Scale

- ☐ Analyze data to refine labor distribution
- ☐ Identify new opportunities for digital labor to drive growth and efficiency
- ☐ Cultivate a culture of continuous learning and adaptation

CASE STUDY

Rebalance

human + agent work. Orchestrate the right partnership between agents and humans to ensure each does what they do best. Know the outcomes with tools, such as Agentforce Command Center.

What is the Agentforce Command Center?

With Command Center, you can easily understand AI agent performance to drive optimal outcomes, ensure accountability, and scale with confidence. It's your all-in-one agentic app for providing clear insights and recommendations to get the most from your agentic workforce.

- ◆ Understand and manage all of your digital labor
- ◆ Drill deep into every Agentforce interaction.
- ◆ See how Agentforce impacts the entire business.

Visualize and Manage Digital Labor

Agentforce Command Center

Total Sessions

2,037

Total Users

1,810

Interactions per Moment

2.68

Average Quality

High

Average Topic Score



Top Ranking Topics

↑↓	Topic Name	Average Quality Score	Total Sessions
#		High	
#		High	
#		High	

Bottom Ranking Topics

↑↓	Topic Name	Average Quality Score
#		Very Low
#		Very Low
#		Very Low

Average Topic Score



Top Ranking Topics

↑↓	Topic Name	Average Quality Score	Total Sessions
#		High	
#		High	
#		High	

Bottom Ranking Topics

↑↓	Topic Name	Average Quality Score
#		Very Low
#		Very Low
#		Very Low

Resources

How Digital Labor Will Reshape the Enterprise

Salesforce News – February 12, 2025



Salesforce Launches Agentforce 2dx: New Capabilities Embed Proactive Agentic AI into Any Workflow...

Salesforce News – March 5, 2025



Marc Benioff says that from now on CEOs will no longer lead all-human workforces—enter the new era of AI coworkers

January 24, 2025



AI's Human Impact: How Agentic Technology Is Reshaping Work

Salesforce News – May 29, 2025



Think AI Agents Are Impressive Now? Just Wait

Salesforce Blog (Lisa Lee) – April 28, 2025



Human-AI Partnership: Salesforce's Blueprint for the Future Collaborative Workplace

Salesforce News – April, 2025



Salesforce Launches Agentforce 3 to Solve the Biggest Blockers to Scaling AI Agents: Visibility and Control

Salesforce Press Release – December 17, 2024



Why Daily AI Use Is Fueling More Creative and Fulfilled Workers

Salesforce News – June 26, 2025



Taming the 'Agentic Wild West': How AI Protocols Will Expand Enterprise Boundaries

Salesforce Blog (Silvio Savarese) – July 3, 2025



When AI Agents Join the Customer Support Team: Lessons From a Successful In-House Test Case

Salesforce News – November 14, 2024





Let's get started!

If you're interested in beginning this journey, then don't hesitate to reach out. Our teams are happy to help you take the first step.

Please reach out to your assigned Account Executive for more details.

WORKFORCE
innovation

