

AI Fluency Playbook

Building employee agency
in the agentic enterprise



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“

We must keep humans at the center of this revolution... This starts with giving every employee the opportunity to work alongside this technology, with tools that make it easy to understand what to delegate, when to step in, and how to fine-tune the partnership between human and machine.”

Marc Benioff in *TIME* Magazine



Why AI Fluency?

Because AI alone doesn't create value, people do.

AI is the new standard of how work gets done. Every industry, every role, and every company is being redesigned.* AI unlocks limitless creativity, productivity, and capacity. Technology alone is not going to deliver this impact – we are.

We have an opportunity to give employees agency by enabling them to understand, apply, and redesign work to succeed with human + agent collaboration.

AI fluency moves AI and Agents from a technology investment into a workforce advantage – driving high performance, productivity, and business outcomes.

How do you know if your employees have the right skills and if you're developing AI Fluency? This playbook is your guide.

It Starts With People

Employees who are included and engaged were **58%** more likely to be confident innovating with AI.**

**[Learn more](#) about the 4Rs to transforming your workforce for AI and Agents*

***Salesforce Employee Survey*

[Click here](#) for AI definitions



What is AI Fluency?

AI Fluency is the ability to confidently collaborate with AI to give employees agency and drive business impact at speed and scale.

AI Engagement

Employee sentiment and confidence around AI.

AI Activation

Consistent adoption of AI in employees' daily work.

AI Expertise

Proficiency of human, agentic, and business skills that drive successful human + agent adoption.



CORE VALUES

TRUST
CUSTOMER SUCCESS
INNOVATION
EQUALITY
SUSTAINABILITY

Guided by values and responsible + ethical AI use

AI Engagement

AI Activation

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AI Engagement

AI Engagement measures employee sentiment and confidence around AI.

To drive engagement, leaders can address employee fears and anxieties, encourage AI experimentation, and show employees how AI can accelerate their careers and work.



Common Fears

How to Address Them



AI will eliminate my job.”

“Jobs will change, as they do in every technology transformation. We can give ourselves agency through change with active learning, skill development, and experimentation.”



I don’t have the skills to use AI.”

“We all have the skills to use AI. AI handles the repeatable, transactional work, freeing you up to focus on the strategic, creative work that only you can do.”



Using AI makes me look lazy or less competent.”

“Effective use of AI is now an imperative. We model it openly, and we celebrate those who use it to drive value.”

AI Engagement

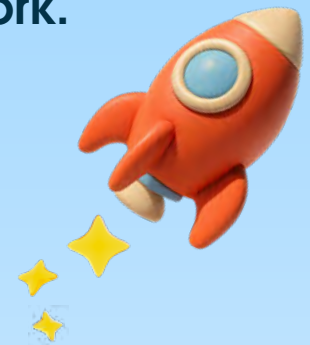
AI Activation

AI Expertise

AI Activation

AI Activation measures consistent adoption in employees' daily work.

AI delivers the maximum impact when we understand and assign the technology to do what it does best. We created the **Human-AI Collaboration Model** to help employees understand when and how to use AI tools to unlock the value of human + AI work:



AI Role	+ Human Role	Value Unlocked	Focus
AI as a Tool	Operator	Accelerating Individual Output	Task Efficiency (e.g. Create an agenda and review context and documents for a meeting with Agentforce in Slack)
AI as an Assistant	Delegator	Streamlining Core Workflows	Process Efficiency (e.g., Automate pipeline analysis with Agentforce Engagement Agent)
AI as a Contributor	Partner	Unlocking Scalability & Quality	Complex Problem-Solving (e.g., Solve a difficult performance bug with Agentforce Vibe)
AI as a Catalyst	Visionary	Driving Strategic Advantage	Innovation & Future-Proofing (e.g. Brainstorm new ideas and processes with Agentforce in Slack)

AI Engagement

AI Activation

AI Expertise

From Exploring to Activating Habits

To move from occasional use to habitual activation, try asking these questions and habit examples to embed AI collaboration into daily work.

AI Role	Human Challenge	Habit Example
AI as a Tool	<i>"What's one repetitive task that slows you down? Let's use AI to win back 30+ minutes of focused work."</i>	The Five-Minute First Draft: Overcome writer's block by using AI to start a first draft of any email or Slack note.
AI as an Assistant	<i>"Which of our workflows is the most time-consuming? How can we delegate a step to an AI Assistant to manage from start to finish?"</i>	The Project Kickstart: Delegate the initial creation of a project plan (phases, tasks, suggested timeline) to get a head start.
AI as a Contributor	<i>"What's a complex, ambiguous problem we're currently facing? Let's partner with AI to challenge our assumptions and explore solutions we haven't considered."</i>	The Idea Sparring Partner: Prompt AI to analyze your hypothesis and provide 3-5 alternative perspectives or counter-arguments, forcing a deeper quality of solution.
AI as a Catalyst	<i>"Looking ahead, what is the single biggest unknown facing our business? What strategic question could we ask AI to help reveal a new opportunity or future risk we might be missing?"</i>	The Market Forecaster: Use AI to analyze a synthesis of external data (industry trends, competitor moves) to propose an innovative, future-state offering or strategy.

AI Engagement

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Human-AI Collaboration Model at Work

Haley Gault is a Territory Account Executive in Small and Medium Size Business (SMB) Sales at Salesforce.

“Slackbot has fundamentally changed how I sell. I used to spend hours trying to understand a new industry before a call – now, I can prompt an agent to surface insights in seconds. What once took two hours now takes two minutes, and I go into customer conversations significantly more prepared and confident.”



Salesforce Use Case: Agentforce in Action*

100% of Salesforce employees are using agents

84% Queries responded to by Employee Agent

136K+ Actions completed by Manager Agent in first 6 months

500K+ Hours saved by using Agentforce in Slack

235K Actions completed by Employee Agent

*Platform Usage Data

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AI Expertise measures proficiency of human, agentic, and business skills that drive successful human + agent adoption.

Here are 3 top skills and learning paths to succeed with human + agent and AI work.

Human Skill

Adaptability

Adjust to new situations and changing circumstances with flexibility, openness, and a positive attitude.

Learning Paths on Trailhead

[Futures Thinking for Strategic Decisions](#)

[Change Management for AI Implementation](#)

Business Skill

Problem Solving

Use a structured approach to identify, analyze, and resolve issues that may arise.

Learning Paths on Trailhead

[Critical Thinking and Decision-Making with Data and AI](#)

[Challenge Framing and Scoping](#)

Agent Skill



Human - AI Collaboration

Interaction and cooperation between humans and AI agents to achieve shared goals or complete tasks using the strengths of both humans and AI to enhance productivity, decision-making, and problem-solving.

Learning Paths on Trailhead

[AI Output Validation & Quality Assurance](#)
[Responsible Creation of Artificial Intelligence](#)

[Contextual Prompting & Grounding](#)
[Prompt Fundamentals](#)

[AI Workflow Orchestration](#)
[Agent Builder Basics](#)



[Get started on Trailhead](#)

AI Engagement

AI Activation

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Measuring AI Fluency

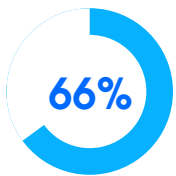
To drive real progress, organizations must track and measure AI fluency.

Using data from system logs, employee surveys, and training programs, leaders can create dashboards – like our internal tool Employee 360 – that identify gaps and measure employees' AI fluency journeys.

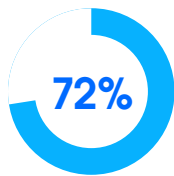
AI Engagement

Employee Sentiment & Impact

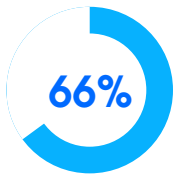
User Confidence



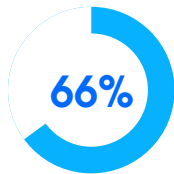
Productivity Gain



Knowledge Sharing



Workflow Reliance



AI Activation

Adoption & Utilization

72% Monthly Active Users
+5% vs. Previous Month



AI Expertise

Proficiency Distribution

Level 1: Practitioner



Level 2: Advanced



Level 3: Pro



Note: All data, metrics, and figures shown in this dashboard are for illustrative purposes only and do not represent actual performance data.

AI Engagement

AI Activation

AI Expertise

AI Fluency at Salesforce

“In the emerging landscape, the role of humans at work is more empowered, interesting, and creative than ever before. Agentic AI will take some getting used to, but will improve many aspects of our work: productivity, efficiency, strategic decision-making, and — in my firm belief — overall job satisfaction.”

—Silvio Savarese

Executive Vice President & Chief Scientist at Salesforce



Building AI Fluency*

In just one year of implementing AI fluency practices...

85% of Salesforce employees
feel confident using AI
tools for productivity

83% feel equipped to
identify and mitigate
risks when using AI

87% of AI power users feel
they get to do challenging,
interesting work

*Salesforce Employee Survey

AI Engagement

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Customer Spotlight: Pearson

Pearson's purpose is to help people realize the life they imagine through learning. Pearson is using Agentforce to support learners in nearly 200 countries – speeding service, lowering costs, and accelerating growth.

“At Pearson, we're focused on diagnosing the most important skills that are needed for today and for future roles – and the career path and progression, so we can bring people in at the right place and help them grow.

We've identified power skills and there's one key one in particular: the skill to learn. Today is all about adaptability, which is why we've added the AI skill to equip employees to work with, build and leverage AI agents.”

–Ali Bebo
Chief Human Resources Officer

Pearson



Let's get started!

Step into the future of work with AI agents. Elevate human potential and transform your business with Agentforce. Our teams are happy to support you on your AI fluency journey as your organization becomes an agentic enterprise.

Reach out to your assigned account executive about Agentforce and visit [Trailhead](#) to get started on your learning journey.

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Key Definitions

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.

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.

AI Fluency

AI Fluency is the ability to confidently collaborate with AI to give employees agency and drive business impact at speed and scale. Organizations can measure progress across 3 key areas: engagement, activation, and expertise.

Agentic Enterprise

An agentic enterprise is a business that operates with boundless capacity, precision, and speed by pairing human expertise with AI-powered agents.

References

[The Future of Work is Still Human: Learnings and the 4Rs to Building the Human + Agent Workforce](#)

July 2025



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[IDC Research: CEOs on Agentic Preparedness](#)

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[In the Agentic Era, Human Imagination Must Shape the Jobs of Tomorrow](#)

August 2025



[AI Agents Give Everyone the Power to Act Like a Leader](#)

October 2025



[Human-AI Collaboration: 4 Ways to Master One of Today's Hottest Skills](#)

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[Growing Worker Demand for AI Skills Creates Opportunity for Institutions](#)

October 2025



[Why Daily AI Use is Fueling More Creative and Fulfilled Workers](#)

June 2025



[Visit Trailhead to get started on your AI Fluency learning journey.](#)