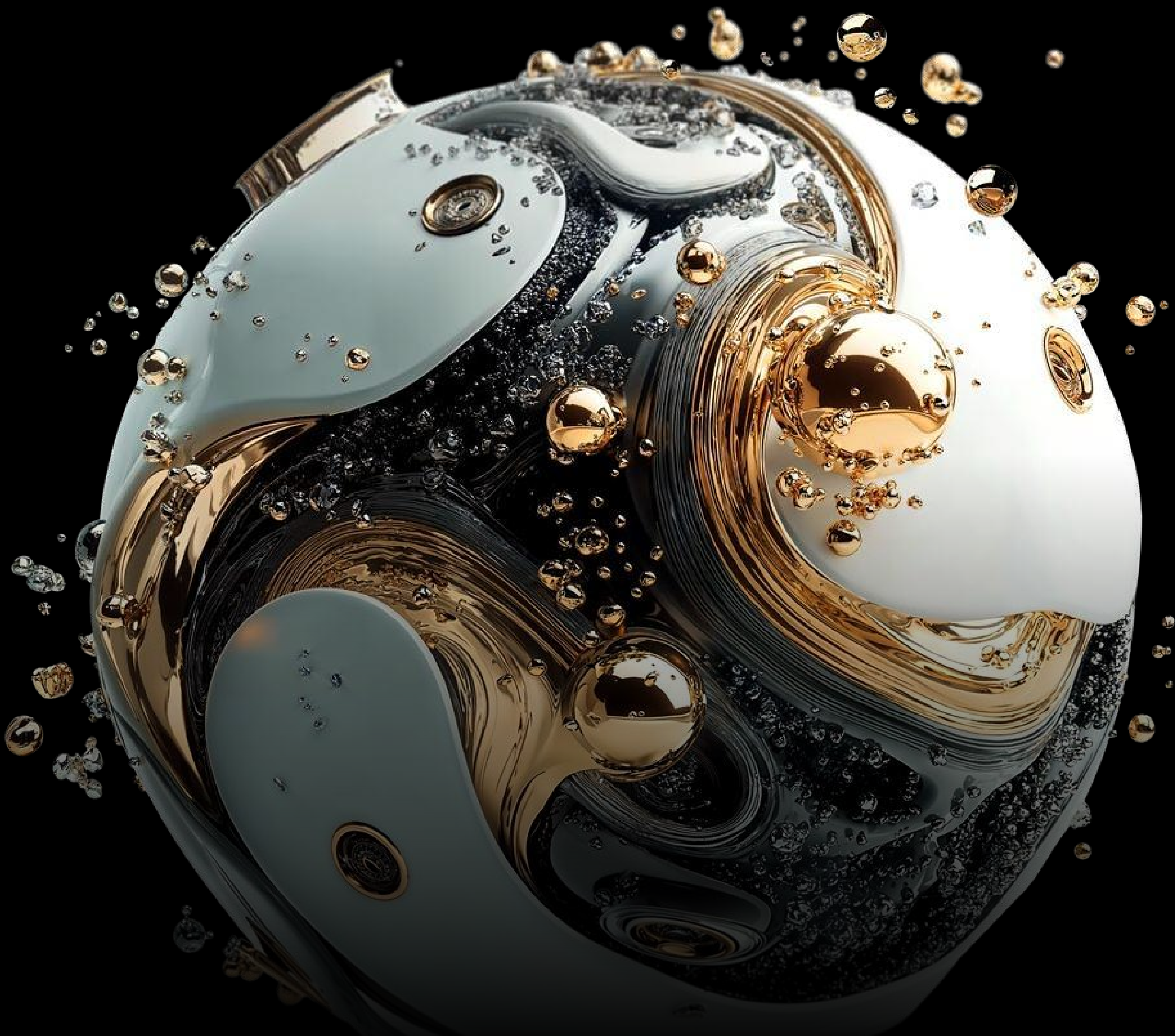
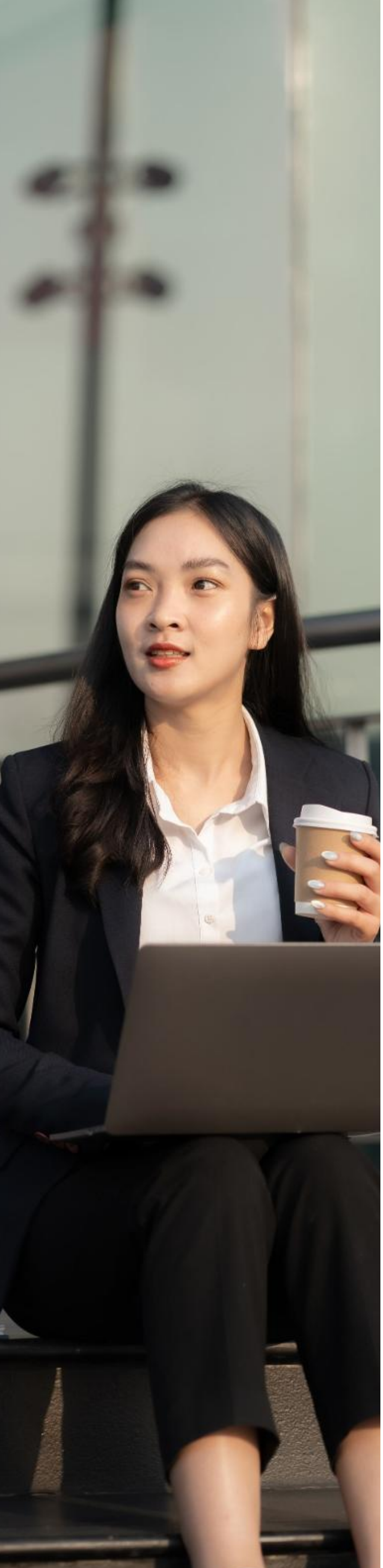


Designing the human advantage in the age of AI

Unleash Agentic AI for outcomes that scale and cultures that thrive



Introduction

Agentic AI has moved from experiment to infrastructure. Autonomous systems can now operate inside the daily work of an organization, where they change how decisions get made, how services reach customers, and how much work a single team can take on.

As growth cycles compress, agility has become the basis of competitive advantage. The differentiator may be how well people and machines work together, and how fast an organization can scale that capability when the market moves.

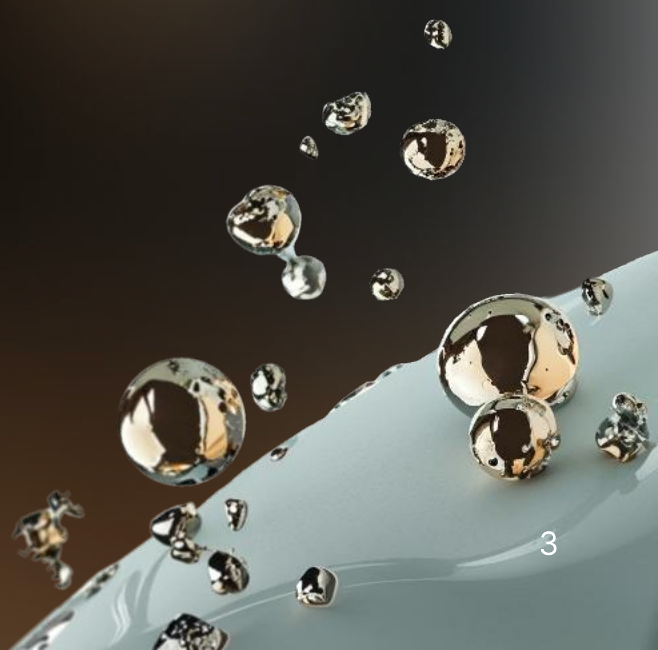
Knowing where the value sits is its own discipline. Deloitte Global's analysis of more than 560 tasks across 108 human resources sub-processes shows exactly where AI capabilities can take on work and where human judgment still carries it. Analyzing the work at that level of detail can show leaders where redesign will unlock return and where it will not. The gap between what the technology enables and what organizations actually capture is the design problem this report addresses.

The 2026 Global Human Capital Trends report makes the case for continuing to invest in people: putting people at the center and redesigning the work around them is what separates the organizations that exceed their AI return-on-investment expectations from the technology-first majority, who are 1.6 times[1] more likely to fall short. A human-centered approach is what can decide the payoff from a Salesforce investment, and building the work around people is the human advantage this report is about.

“AI adoption is advancing faster than any technology we have worked with. What is scarce is the judgment to design where people and agents each add the most value, and that design work decides whether an AI investment pays off."

Harry Datwani

Salesforce Chief Commercial Officer, Deloitte Global



Get the human-AI relationship right

The value of Agentic AI is decided in how people and agents interact day to day, whether the data underneath can be trusted, and who answers for a decision once AI has a hand in it. The first three human capital trends are about designing each of these deliberately.

Design the work before you switch on the agent

Human Capital Trend: How do we maximize the value of humans and machines working together?
The Challenge: Agentforce delivers value at scale when an organization redesigns the work around it with intent.

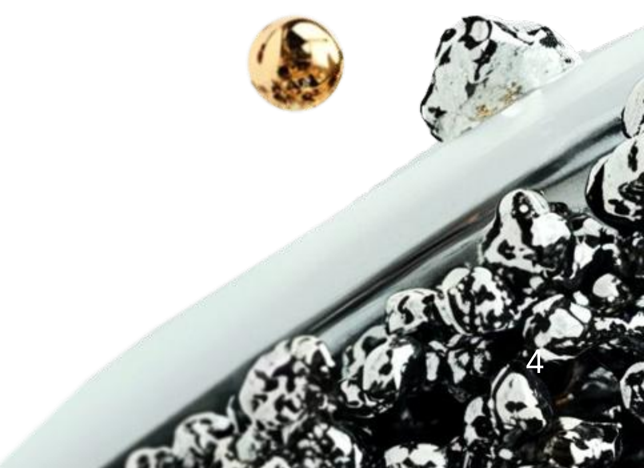
Deloitte's research points to a technology-first approach as the main reason organizations fail to see value from AI. When Agentforce is treated as a pure technology project and layered onto legacy systems and existing ways of working, it can reinforce the problems already there, automate the wrong things, and return marginal gains on the investment.

Deloitte's work on redesigning HR around AI highlights the difference: layering AI onto existing processes tends to produce a productivity lift around 5%, while redesigning the work around AI can lift it closer to 30%. Yet few organizations have closed that gap: in the 2026 research, 14% of leaders report feeling adept at shaping how people and AI interact, and the ones who do are 2.5 times more likely to report stronger financial results.[2]

"Clients should understand that simply switching on AI isn't enough. To unlock real value, organizations should intentionally redesign work at a granular level, focusing on how humans and AI agents interact in daily processes."

Kyle Forrest

Future of HR Leader, Deloitte US Consulting



The gains come when organizations rewire processes, workflows, and roles around human-AI collaboration. That starts with an honest assessment of where Salesforce adoption stands today: which features get used, where processes are ineffective, how clean the data is, and where users hit friction. Agentforce is then applied to clear the friction and rebuild the workflow around it. Deloitte Digital frames the design around six principles, with work that is outcome-focused, contextual, transparent, adaptive, human-centered, and empowering, each applied to the process and the role that carries it out. To put these principles to work, Deloitte Digital brings agentic front-office blueprints: reusable process designs for reshaping sales, service, and marketing work around Agentforce. These blueprints give organizations a starting point and a faster path from principle to redesigned process.

Design happens role by role. For a sales rep, a service agent, or a marketing manager, the questions are the same:

01

SHOULD AI ACT AS AN ASSISTANT, A COACH, A COLLABORATOR, OR AN AUTONOMOUS AGENT?

02

WHERE DOES A HUMAN NEED TO STEP IN?

03

HOW ARE ACCOUNTABILITY AND TRUST MAINTAINED?

04

WHAT DOES THE CHANGE MEAN FOR THE ROLE ITSELF?

Case study: A financial regulator clears cases faster

Deloitte Digital worked with a leading financial regulator to deploy Agentforce to support the analysis of financial complaints and compliance cases, work that demands heavy documentation review and long resolution times. The agents process case details and interactions quickly, producing a concise summary that gives staff immediate clarity without sifting through emails, attachments, and notes by hand, along with a full history of the tasks and communications on each case. People and their supervisors stay accountable for recommending outcomes and next steps.

Case analysis is dramatically faster, and specialists spend their time on the recommendations that matter.

The practical path is to automate low-risk, repetitive tasks first, then reimagine the wider workflow to strengthen human decision-making, with user advisory squads testing the design in safe, non-customer-facing settings before go-live. In this way, AI raises the value of human judgment, agency, and the enduring skills like empathy and creativity that people bring to their work. Agentforce becomes a collaborator and coach, with clear escalation paths and Salesforce's built-in audit trails and guardrails keeping decisions well managed.

Salesforce's own use of Agentforce shows what reshaping work looks like in practice. Its deployment for customer support has handled around 2.6 million conversations and now resolves roughly 63% of customer questions,[3] with satisfaction scores close to those of human agents.

Deloitte Digital works at the intersection of technology, organization, and workforce, helping clients rethink their AI-enabled operating model and put the right governance and ethical guardrails in place. For individual roles, that means reviewing job architecture and team composition, planning how the change lands, and reworking workforce strategy so employees are reskilled into an AI-driven way of working.

AI is only as trustworthy as its data

Human Capital Trend: **How do we know what is true about people and work?**

The Challenge: As Agentforce spreads across the business, the reliability and value of each AI-driven decision relies on trustworthy data.

Each AI-driven decision inherits the quality of the data beneath it. Deloitte's 2026 report raises the question of authenticity directly: as AI generates and acts on more information, how do organizations know what is true about their people and their work? This is bigger than data hygiene. If AI-generated content begins to populate the records a business runs on, leaders face a harder question about what they can rely on when they make workforce decisions.

For Salesforce customers, those decisions draw on data from across the business, and the customer relationship management (CRM) system is where much of the customer sales and service data comes together and turns into action. That role carries more weight as AI integration grows, because each Agentforce decision and suggestion draws on the same foundation.

Keeping that foundation accurate and trustworthy means building verification and transparency into the process from the outset.

Salesforce's built-in trust features support this directly. Data validation, detailed audit trails, and transparency controls help to maintain confidence in Agentforce-driven operations and support compliance by tracking where data and decisions come from. Integrated analytics monitor what the agents do and flag anomalies as they appear.

Automation still needs human oversight. The same features that speed up data entry and validation can amplify errors or introduce inaccurate content when they run unchecked, so people stay in the loop to check and verify AI-generated content, such as summarized case notes, before it is saved and accepted.

The discipline starts before go-live, with careful feature activation and continuous testing and revalidation. Salesforce can be set up to label AI-generated content clearly and keep a transparent audit trail of agent-led actions, so leaders can trace where information has come from and judge how far to trust it.

This is where Deloitte Digital's expertise around governance pairs with the platform. Putting the right governance frameworks and human-review processes around Salesforce's controls is what preserves data authenticity and human agency as Agentforce adoption widens, and it gives the organization evidence for the trust it places in its data.

Keep people accountable when AI decides

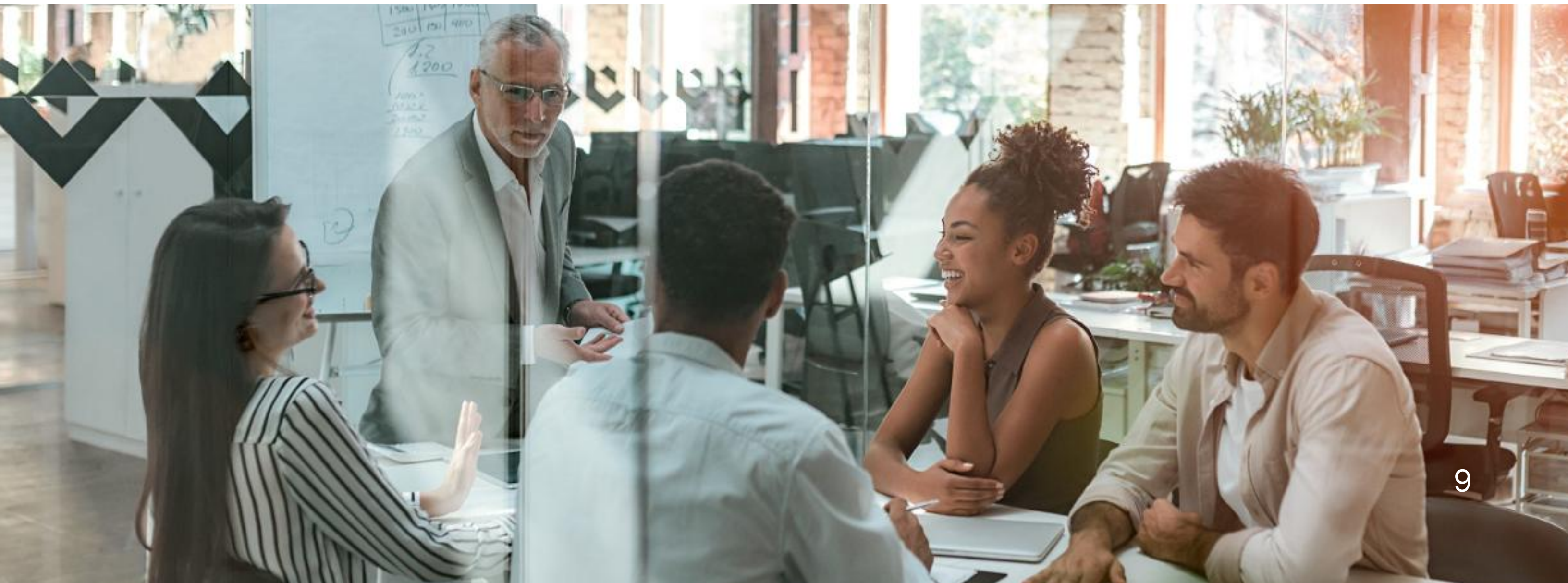
Human Capital Trend: Who is accountable when both humans and AI are making decisions?

The Challenge: As agents move from automating tasks to making decisions, organizations should be clear about who answers for the outcome.

Deloitte's research considers decision-making as a capability in its own right. As people and AI work together as deciders, organizations should design how that collaboration works and hold decision-making to the standard they apply to the core competencies.

As Agentforce takes on more, moving past task automation into making decisions, managing escalations, and running overrides, the redesign of work should settle one question first: where does accountability sit? That means revisiting governance frameworks before the agents go live. It matters in regulated industries like financial services and healthcare, where compliance risk is high and the organization has to be able to trace and explain why AI reached a given conclusion.

In the 2026 research, 60% of executives report they already use AI to inform decisions, while only 5% say they consider their organizations to be in the lead on managing it.[4]



The mechanism is a human in the loop: a person stays accountable, so trust holds and oversight is present. The practical work is to tier decisions by risk, separating the low-risk tasks an agent can run on its own from the high-impact decisions that need a person's judgment, especially where the consequences for the organization could be significant. Deloitte Digital builds this into the design through a closed loop of detect, plan, nudge, insight, action, and learning, so accountability and oversight are built into how an agentic workflow runs from the start.

In the financial regulator's deployment, that principle is built into the design, with supervisors as the human in the loop. The agents search and analyze financial complaints and compliance cases across a portfolio, and supervisors lead the verification. That keeps accountability clear and mitigates risks like hallucinations that would otherwise undermine the integrity of the results.

Agentforce supports this directly. It helps enable defined escalation paths, overrides, and hand-offs between people and agents, so humans keep control of the "why" and remain accountable for outcomes. Organizations decide what an agent handles on its own and what stays under human control. The work for leaders is to make the agent's role clear and to protect the place of people in how decisions get made.

Reinvent the operating model

Orchestrate capability and capacity at speed

Human Capital Trend: How do we orchestrate capability and capacity at speed?

The Challenge: Real agility depends on scaling capability & capacity fast enough to keep pace with the market.

In Deloitte's 2026 survey, 67% of leaders expect their main edge over the next two to three years to come from their organization's speed and nimbleness, ahead of scale.[5] That kind of agility depends on scaling capability and capacity quickly, which calls for the continuous evolution of people, skills, data, and technology. Salesforce and Deloitte Digital position Agentforce at the center of this, where it can raise speed, quality, cost-efficiency, and human capability at the same time.

Scaling capacity is one half of the picture. The other is capability: building the human fluency to work alongside agents. Yet while 88% of leaders say orchestrating capability and capacity at speed is important, only 7% say they are doing it well.[6] There is a difference between AI literacy, understanding what the technology is, and AI fluency, applying it in context, collaborating with agents, and integrating it into roles and daily work. Salesforce's view is that fluency is what turns AI from a technology investment into a workforce advantage, the difference between deploying tools and changing how work actually gets done. Without that fluency, scaling agents returns only part of the value.

Agentforce works as an intelligent orchestration platform, assigning tasks between digital and human agents as conditions change. Organizations can scale capacity quickly by re-routing work to agents during peak demand, including tasks usually handled by people, so service levels hold and the business adapts as demand moves.

For example, Deloitte has been working with a leading airline on its Agentforce deployment to strengthen customer service. When major disruptions struck, the airline used Agentforce to scale capacity and capability for crisis management, deploying agents as a round-the-clock first point of contact. The agents triaged customer queries, handled immediate requests like flight-change information and refunds, and routed complex matters to a smooth escalation path. That pivot helped the airline manage a sudden surge in demand and deliver support when it was needed most.

Case study: Global pharmaceutical rollouts without the training overhead

Deloitte Digital is working with global pharmaceutical organizations on their Salesforce Life Sciences Cloud implementations. An estimated 95% of field-based users are expected to move onto Salesforce from another CRM without attending traditional training, supported instead by the Agentforce Adoption Agent in the flow of their work. The time saved goes back into customer-facing activity.

Scaling capacity on demand and building capability in the flow of work draw on the same orchestration layer. Organizing the rest of the operating model around it is where the next trend goes.

Organize around outcomes

Human Capital Trend: How do we get more value from our functions?

The Challenge: Functional silos can hold the business back, and getting more value from each function means running work across them.

Cost pressure, the need for faster multidisciplinary capability, and the push to get more from functional specialists are moving organizations past conventional functional boundaries. As work becomes more automated and interconnected, the cost of operating in silos shows up as inefficiency, communication breakdowns, and missed opportunities, and that cost is harder to carry each year. Salesforce's agentic capabilities give organizations a way to dismantle those silos and move toward agile, outcome-focused operating models.

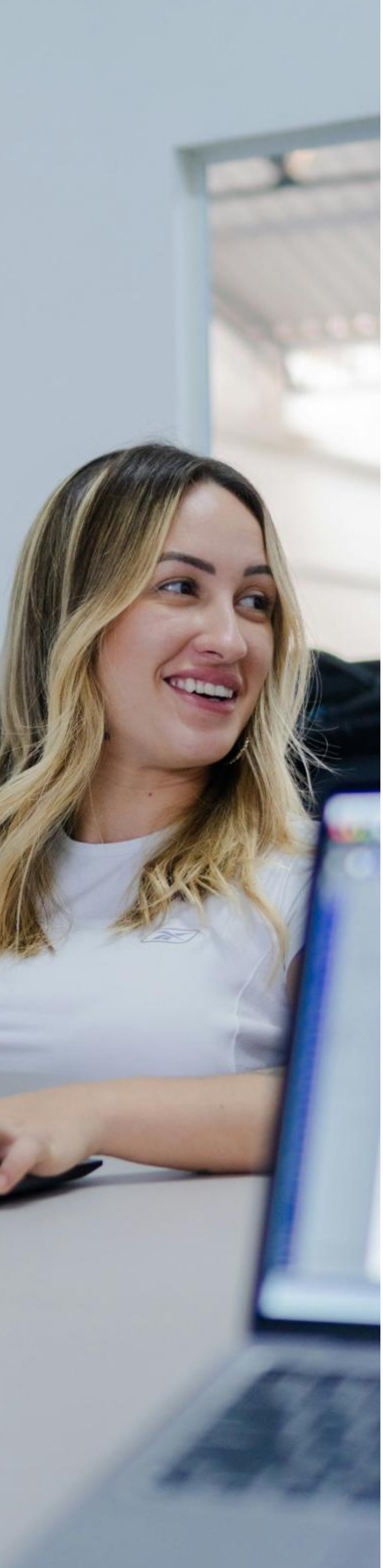
The 2026 research describes the operating model that makes this work. Cross-functional teams own the outcome end to end, bringing together the people disciplines that shape work. This includes workforce planning, job architecture, and skills; with finance, operations, and IT as the governance layer. It's the organizational counterpart to the technology: the platform connects the systems, and this structure connects the people and decisions around them.[7]

Salesforce and Deloitte Digital work with organizations to map outcome-focused journeys and an end-to-end view of how work gets delivered, then run that work on integrated platforms. Agentforce acts as connective tissue across departments that used to operate apart, coordinating and automating tasks, sharing data and actions between teams, and keeping work from falling through the cracks. Underneath it, Data 360 keeps one trusted foundation, so data, tasks, and approvals move across a multi-agent ecosystem, from the first customer interaction through service delivery and financial reconciliation.

Case study: A manufacturer puts a single front door in front of its dealers

Deloitte Digital is working with a leading agricultural manufacturer on an Agentforce front-office solution that helps to improve dealer self-service with context-aware responses. The agent connects to the back-office enterprise resource planning (ERP) system to pull real-time information, giving dealers visibility across the end-to-end fulfillment process and accurate answers without being sent to separate channels. Interactions run around the clock, with prompt problem-solving and a smooth escalation to human support when a case needs it.

This helps to cut wait times and keeps complex cases moving.



Integrated workflows like this can improve efficiency, cut turnaround times, and lift the employee experience by reducing manual handoffs and bottlenecks. The same approach extends to a full marketing-to-cash journey: Agentforce orchestrates the workflow across systems, manages approvals, and brings the data into one process, passing tasks and approvals between agents from sales order to cash collection and following up on anything still pending. Marketing, sales, and finance work from a single view of the customer, response times drop, and the customer experience improves.

Salesforce first ran Agentforce on its own employee service function as Customer Zero, and that project led to the launch of its HR Service Management product. Deloitte Digital delivered the original implementation and now brings the product to clients as organizations consolidate their internal service operations.

The goal is a single employee-facing agent that handles HR and IT requests through one interface, with ITSM and HR Service Management together covering the internal service centers employees rely on.

Salesforce recently launched Salesforce Headless 360, an architectural framework that decouples the Salesforce user interface from its underlying CRM data and business logic. Because every capability is reachable directly, the work can happen where people already are. A sales rep can log an opportunity or update a record from Slack or another tool they already use, without opening Salesforce, and the platform's validation rules and approvals fire exactly as they would in the standard interface. Agents acting on a rep's behalf work the same way. This changes what training and adoption need to look like, since people work through the interfaces they already use, which shortens the learning curve for a new platform and supports higher engagement and adoption.

Keep people at the center

Designing the system and scaling it pays off when the people doing the work adopt it. The final two trends cover the culture that adoption depends on, and the methods that keep people moving as change becomes constant.

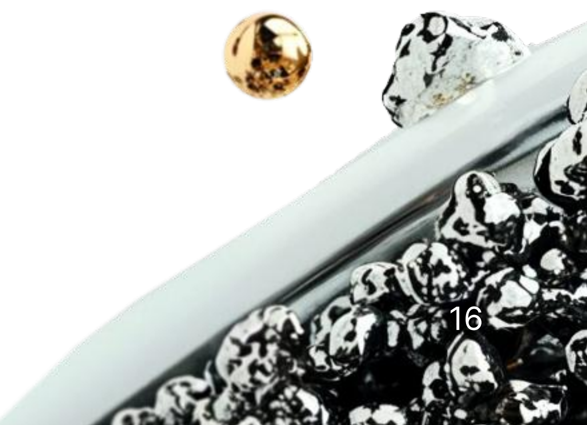
Build the culture AI adoption depends on

> **Human Capital Trend:** How is AI changing our culture?
> **The Challenge:** Agentforce adoption depends on culture, and neglecting AI's impact on people builds cultural debt that is costly to repay.

The clearest answer to the fear that AI hollows out the workforce is what happens when culture is handled well. Working with Salesforce, the healthcare provider Simplyhealth streamlined large parts of its customer operations. AI agents now handle 80% to 90% of standard queries, claims automation has reached 82%, and reimbursements settle within a day. Customer service roles fell by 40%, while the staff who remained received a 30% to 35% pay increase, reflecting their move into complex queries that require empathy. Backed by thorough change management, staff engagement held steady through the transition. AI took on the routine work, people were elevated and rewarded for the work that remained, and the culture held.[8]

"Agentforce can lift productivity quickly, but the gains last only when people trust how it is being used. That is a culture question first. The leaders who invest in their workforce through the change keep their best people."

Polly Sumner
Chief Adoption Officer, Salesforce



Simplyhealth shows what handling culture well makes possible. Neglecting it can carry a cost. In the 2026 research, 42% of workers said their organization rarely evaluates AI's impact on its people.[9] Paired with an AI-first narrative, that neglect may lead employees to question how much their contributions are valued, which deepens existing organizational problems over time.

Deloitte calls this accumulated cost cultural debt. Successful Agentforce adoption depends on a strong, inclusive culture, and the organizations that reinforce trust, employee value, recognition, and belonging are positioned to benefit. Designing for culture from the start can keep that debt from building, even as Agentforce changes how people see their roles.

Pairing an AI-first strategy with a humans-first mindset can keep human potential at the center of the work, alongside the business value Agentforce can generate. Deloitte Digital's Future of Service with Agentforce experience supports this directly: an immersive one-day session at the Deloitte Lightbox Studio where business leaders shape their customer service strategy around Agentforce. They should leave with an actionable plan anchored in seven key pillars, including data, risk and compliance, use case selection, workforce implications, and change management.

Agentforce changes tasks and roles and raises the employee value proposition, most visibly in customer service. As AI takes on routine work, the people who remain handle the sensitive, complex, important relationship interactions that matter. This work attracts a different kind of employee: one who is more empathetic and technically skilled, and who acts as a brand ambassador.

Some capabilities stay out of AI's reach. Empathy, curiosity, and agility grow even more important as Agentforce takes on more of the routine work, and Salesforce customers should identify and protect these enduring human capabilities so they stay central to the workforce's value. In practice that means rethinking learning and workforce strategy and deciding where to recruit, reward, or retrain for these skills, so human ingenuity and connection stay at the core.

Stay relevant as change becomes constant

Human Capital Trend: How do we stay relevant?

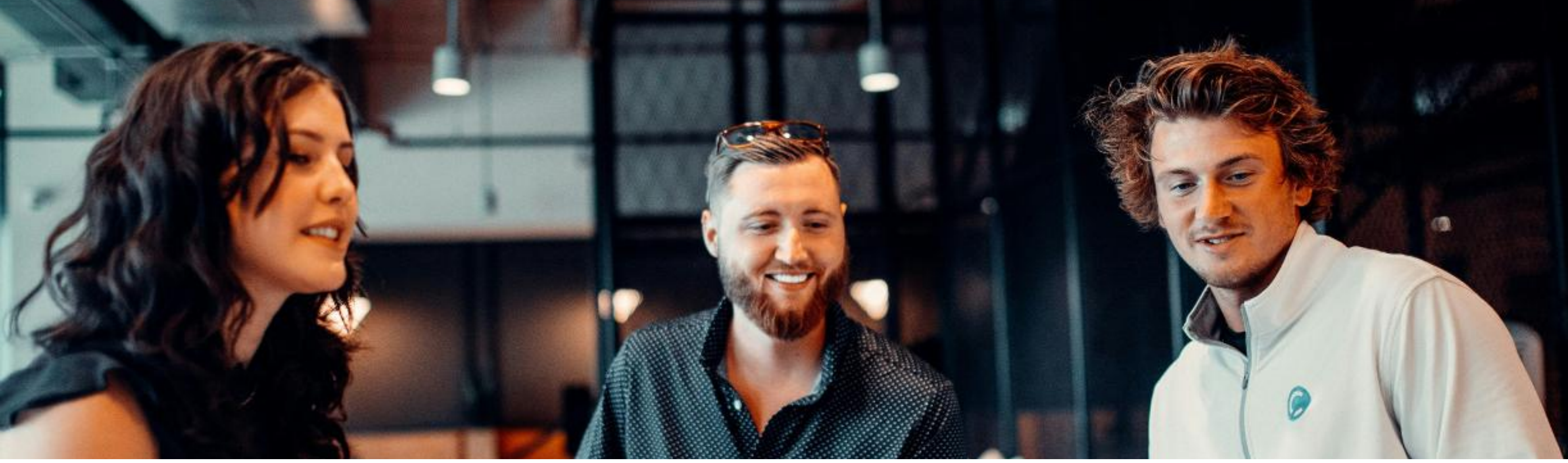
The Challenge: Change is now constant, and the value of Salesforce depends on making adoption continuous.

The Deloitte 2026 Human Capital Trends report describes many changes organizations face as AI reshapes the work, including how people and AI collaborate, how capabilities get orchestrated, how operating models reorganize around outcomes, and who is accountable when AI decides. Each of these asks organizations to keep adapting, which has changed the nature of change itself from occasional rollouts into something continuous. Change has become an always-on condition.

Deloitte Digital addresses this constant change with the User Success methodology, which draws on the customer success concept common in software-as-a-service companies and focuses it on the end-users inside an organization. It embeds change into daily work so adoption becomes a steady, ongoing process, and it rests on three pillars: data and insights, hyper-personalization, and agentic approaches that help enable continuous and adaptive change experiences.

User Success = informed by data and insights + hyper-personalized + powered by Agentic AI

Deloitte Digital frames User Success as an infinity loop of change: user data and feedback inform hyper-personalized experiences, those experiences generate new data, and Agentforce supports users in their workflow to accelerate adoption. The premise is that unlocking value from the Salesforce platform and AI is primarily an adoption challenge, so User Success exists to cut the time a Salesforce solution takes to go from rollout to being embedded in daily work.



The first pillar ties adoption to strategy. Deloitte Digital convenes leaders in experiential Vision Labs to define how Salesforce investments connect to core strategy, grounded in frameworks like Salesforce's V2MOM (Vision, Values, Methods, Obstacles, and Measures). User Success then draws on existing system data first. By reading how people already use current platforms, it identifies adoption patterns that predict future behavior and uses them to shape the change strategy. Next, it analyzes data from user engagement with change activities: open rates, page visits, embedded surveys, agent probes, and real-time Agentforce insight into how users work, which together inform a hyper-personalized, adaptive experience for each user.

The second pillar paces change to the individual. More than 84% of workers say personalized change helps them adapt.[10] User Success works at the unit of one, tailoring communication, learning, and support to each user, while using marketing-grade tools so engagement feels like the consumer products people already use. The effect is reduced change fatigue and faster adoption.

The third pillar puts AI to work on adoption itself. The Agentforce Adoption Agent onboards and upskills users in the flow of work, tracks behavior in real time, and delivers nudges that sustain change over time, drawing on grounded data libraries as a single source of truth that retires outdated documentation and simplifies global, multi-language rollouts.

Agents also coach in the flow of work, using role-play and simulation to build skills while people do their jobs. Agentforce Sales Coach gives sales teams personalized practice on their pitch, with real-world scenarios for objection handling and role-plays. As agents take on more of the day-to-day, traditional training recedes and the Adoption Agent becomes the way change reaches people in the flow of their work. Designed well, User Success can let an organization keep adapting while change stays constant.

Decisions that echo

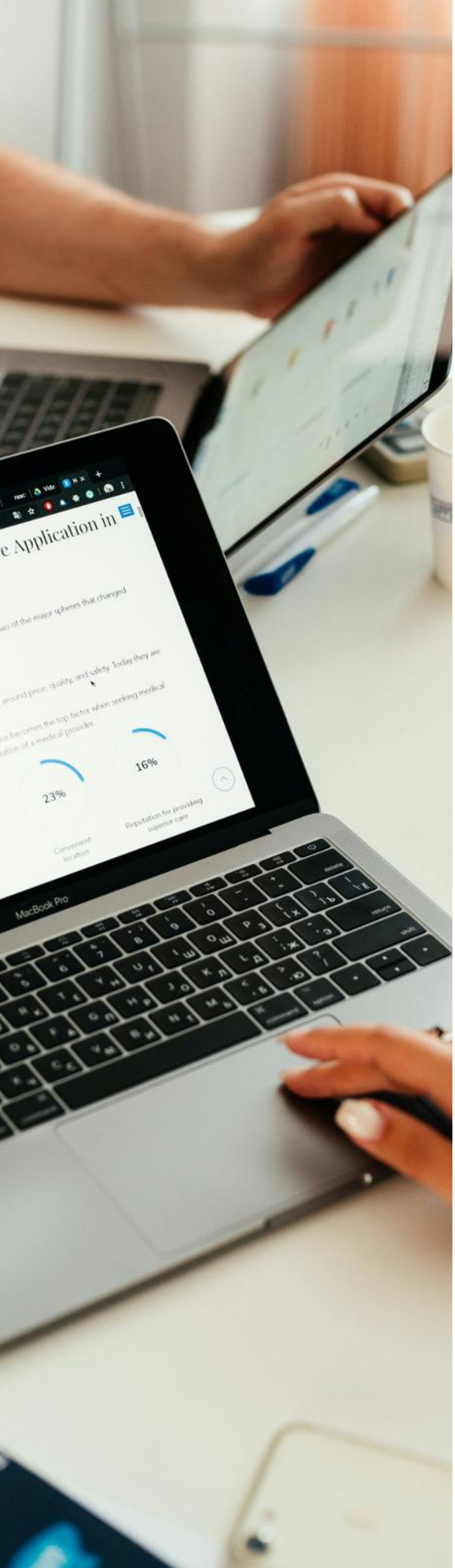
The choices organizations make about AI no longer stop at the edge of the business. Deloitte's research shows corporate governance changing in step: boards are now expected to weigh financial performance alongside the effect of their decisions on human sustainability, ethics, and the wellbeing of society.

These choices echo inside the business as much as outside it. Leaders across technology, transformation, and HR must decide which tasks AI will handle, which roles will change, and which workers will be reskilled rather than displaced. Those decisions shape whether employees trust the people and functions meant to advocate for them. Governing those choices well is part of the same stewardship.

"Success in the era of AI will be influenced by uniquely human skills, the development of which begins in early childhood."[11]

The bigger stakes are human. Agentic AI affects employee wellbeing, employability, inclusion, and public trust, and how it lands there shapes whether an Agentforce strategy earns support. The gains hold up when AI works as a proactive guardian of human potential, which means choosing use cases that balance value for shareholders with value for the people and communities a business touches.

Leading organizations are already putting this into practice. Deloitte and Salesforce collaborated on UpLink, the open innovation platform of the World Economic Forum. Yes/Cities is a collaboration led by the World Economic Forum's Centre for Urban Transformation that helps cities run location-based challenges to revitalize their communities, create circular economies, and ignite community entrepreneurship.



The first pilot location was San Francisco: Deloitte, Salesforce, the World Economic Forum, the San Francisco Chamber of Commerce, Citi, and more than 20 other organizations launched Yes/SF in 2023 as an UpLink innovation challenge calling for solutions to sustainably revitalize downtown San Francisco.

Deloitte is a founding member of the Business Taskforce for Early Childhood, led by the UK's Royal Foundation, whose report found that investing in early-years outcomes builds the human skills people need to thrive in the age of AI, with the potential to unlock £45.5 billion (over US$60 billion) a year for the UK economy.[12] Those findings were showcased at the 2025 Future of Workforce Summit at Salesforce Tower in London.

The organizations that lead should use AI to solve real problems beyond cost-cutting, and the benefit should reach the communities they operate in. Choosing the human advantage is a business decision and a stewardship one at the same time.

Looking ahead and how to get started

In the age of AI, the human advantage comes down to three priorities:

Get the human-AI relationship right: Design how people and agents interact, role by role, on data you can trust, with a person accountable for each decision.

Reinvent the operating model: Run work across functions, products, and capacity as one connected system, organized around outcomes.

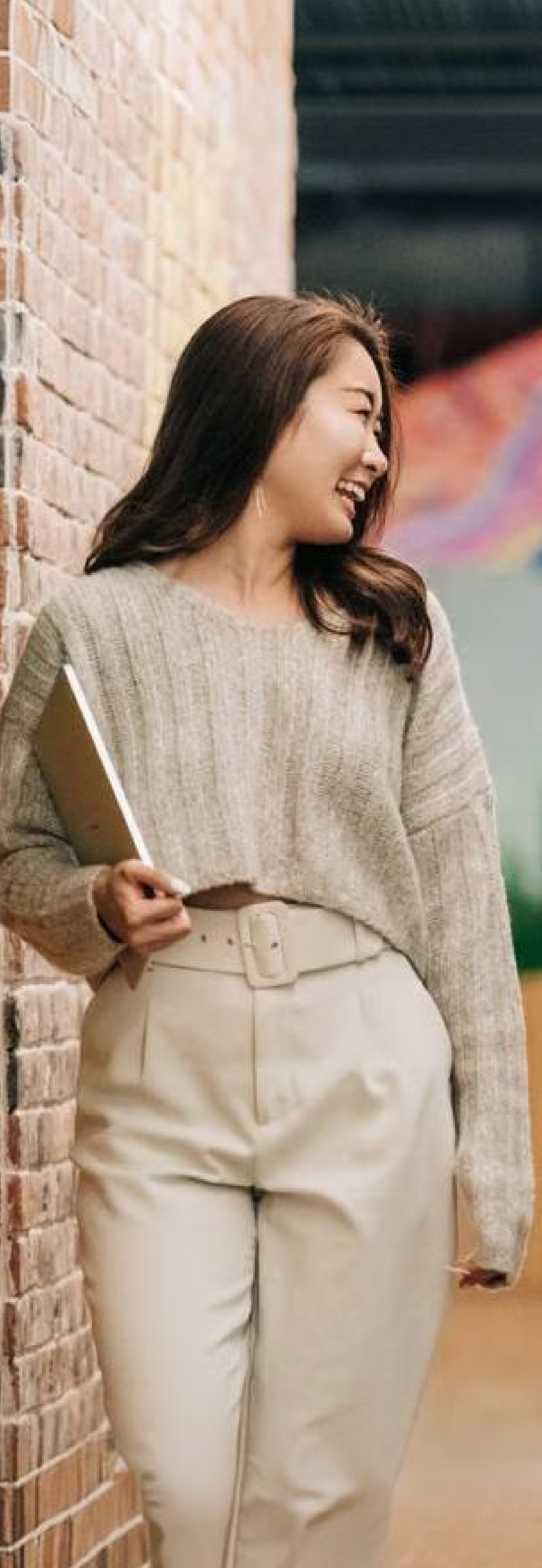
Keep people at the center: Protect the culture that adoption depends on, and keep that adoption continuous through User Success.

GETTING STARTED DOESN'T REQUIRE A FULL-SCALE TRANSFORMATION. THREE ENTRY POINTS OPEN THE WORK:

01 Put existing Agentforce investment to work. Where a license is already in place but under-used, a high-friction internal workflow is a natural first front door. HR service, ITSM, and employee service centers are common starting points.

02 Audit how your organization designs human-AI interactions today, and where the gaps are holding back return.

03 Bring cross-functional leadership together across sales, service, marketing, HR, IT, and the business to define what orchestration looks like in your context.



The path from here usually runs through three stages: **reimagining the work, activating the technology and the workforce around it, and transforming the operating model so the gains hold.** The choice leaders make at the outset, whether to aim for business as usual, cost efficiency, or value creation, sets how far that journey goes.

This is the work Deloitte Digital undertakes with clients, where business transformation leaders and chief information officers work alongside chief human resources officers to design the interactions, the data foundation, and the workforce implications together, grounded in frameworks and experience built across many of these transformations.

The goal is to design around your people so Agentic AI can deliver outcomes that scale and a culture that thrives. Salesforce brings the platform, and Deloitte Digital brings the design and adoption work to put it in place.

Get in touch

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