



salesforce

# Transforming the human + digital workforce

How KPMG and Salesforce take  
a human-centered approach to  
agentic AI





Agentforce allows organizations to automate large components of key roles through data-driven problem-solving and task execution. Agentforce generates sales leads, prepares meetings, facilitates customer support, and enables new employee recruitment—all roles historically performed by humans.

The transformation of digital labor is just beginning as companies start to implement agentic AI to expedite or autonomously perform work that once was performed completely by their human workforce. Leading the charge is Agentforce, the Salesforce agentic AI solution. Agentforce is rapidly changing and augmenting everything from simple tasks, such as retrieving customer data, to more complex business functions, such as sales enablement, product fulfillment, and fully automated, end-to-end customer support.

**Agentic AI is not just a stunning technological advancement. Agents are a strategic imperative for companies seeking to leverage AI to drive process efficiencies.**

The transformation is not about the technology alone, however. It largely lies with the human workforce, who will need to develop new skills, learn newly redesigned roles, and be expected to make a bigger impact as they transition to a “humans + agent” digital workforce.

This revolution gives rise to several key questions: *How do you pinpoint the right use cases and roles for deploying Agentforce? How do you reshape your workforce to accommodate this new digital labor? How do you prepare your people and customers for a complete step change in experience?*

The answers seem counterintuitive in the age of machines: Take a human-centered approach to extract the greatest value from your investment in Agentforce. Assess, reshape, and transform your workforce to:



Identify the capabilities that differentiate you from your competition



Prioritize the functions, processes, and roles that can leverage Agentforce



Design agent roles and responsibilities aligned to your priorities



Clearly define the agent plus human interaction experience

These activities—supported by strategic change management (for continuous learning and adoption)—make for a robust, human-centered Agentforce implementation.



# The imperative for taking a human-centric approach

Agentic AI may have an unprecedented ability to organize and analyze data, but it is the intersection of AI with human ingenuity and critical thinking that makes the real difference. The true value of agentic AI is realized when organizations use it to complement and enhance human skills.

When this alchemy occurs, three imperatives naturally arise.



## Work must be intentionally orchestrated across human and digital labor

Integrating AI agents into the organizational structure requires meticulous workforce analysis. Strategic workforce planning must define the roles that AI agents will play alongside human workers, considering the interplay among people, technology, leadership, and social norms. Determining where and how to leverage AI agents to augment, complement, or repurpose the human workforce should be viewed through an outcomes-focused lens to ensure a meaningful return on investment.



## Digital talent must be managed the same as human talent, including onboarding, performance measurement, learning, and upskilling

Since AI agents function as team members, they should be included in the organizational chart with clearly defined roles, responsibilities, and reporting lines based on their structure and capabilities. Designing a digital workforce requires a holistic strategy that includes new methods for organizational design, culture, teamwork, and trust. Human resources should manage agent performance and engagement much like their human counterparts, focusing on optimizing human and digital workforce collaboration to deliver higher-touch services.



## Workforce planning must change to accommodate digital labor to keep pace with the shift toward embedding emerging technologies into day-to-day workflow

In the age of human-technology collaboration, any potential AI agent investment should prioritize the workforce impact. Since technology is changing so rapidly, companies can no longer make five-year plans; instead, they must manage their workforce in real time and reflect their evolving needs in a continuous feedback loop. As AI agents continue to evolve in maturity, there will be a need for continuous course corrections across the human/digital workforce, including budgeting, critical skills, and even the size of the organization.

Orchestrating and optimizing the collaboration of humans and AI agents offers the keys to unlocking transformational value by creating:

- New ways of productivity and efficiency
- Improved organizational models unlocking the power of human-AI collaboration
- Upskilling vehicles
- Personalized adoption that expands AI investment impact
- Dynamic talent pipelines for human and digital labor.

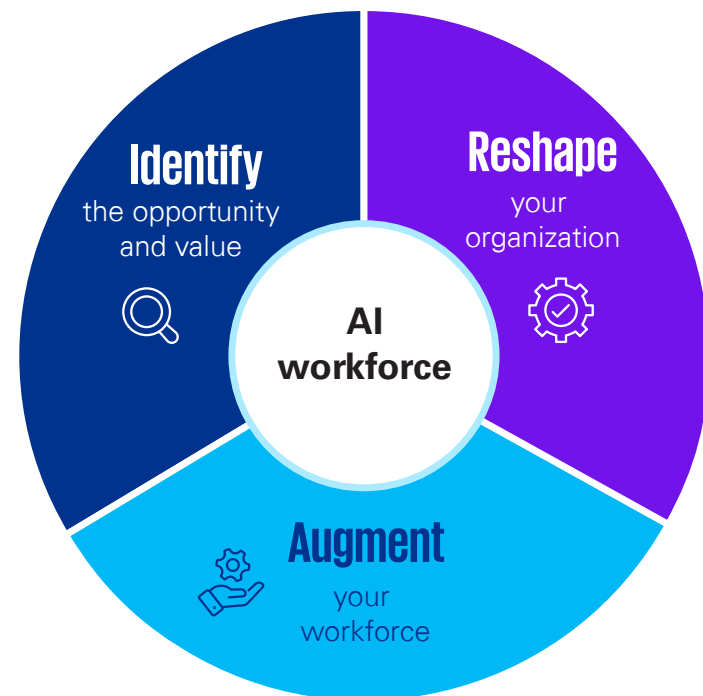
By managing digital talent with the same rigor and care as human talent, and by continuously adapting workforce plans to accommodate emerging technologies, organizations can ensure that they not only stay ahead of the curve but also create more meaningful and impactful outcomes. Embracing this human-centric approach is not just a competitive advantage; it is a necessity in a world where the lines between human and digital are increasingly blurred.



# Getting started with agentic AI

KPMG has a proven process to help organizations navigate workforce transformation with agentic AI. KPMG has a proven process to help organizations navigation workforce transformation with agentic AI called KPMG AI Workforce.

The KPMG AI Workforce process includes three-steps to help maximize the value of AI investments. Through these steps, KPMG helps organizations unlock significant value from their AI investments by placing people at the core of transformation.



## 01

### Identify the opportunity and value

It is important to identify and assess agentic opportunities and requirements across the processes you prioritize, whether they are sales support focused or client-facing engagement.

This initial step helps clients:

- Gain insight into AI opportunities and workforce levers that will unlock value
- Align on a clear vision and assess the organization's readiness to change
- Develop the value case and workforce strategy to drive the transformation.

Then KPMG can match the data, systems, and resources required to enable your solutions.

KPMG AI Workforce keeps four principles in mind during this assessment:

#### **Prioritize processes that yield the greatest business impact.**

This principle could include data capture, direct sales, customer engagement, postsale support, or any other steps in your organization's value cycle. This will quickly help focus and prioritize opportunities to introduce agents to maximize value.

#### **Define agentic roles based on the human roles performed today.**

This helps determine the greatest efficiency and return on investment for the processes, organization, customers, and employees.

#### **Performance matters for human and digital labor alike.**

Developing a human-centered approach enables you to consider how best to align your leadership and support your people. Build prototypes that can drive the change and adoption that will be necessary.

#### **Data dictates success. Validate the availability of data sources.**

Make sure you can actually power the agent.





KPMG employs a number of tools to help clients reshape how work happens in their organization, including these:



### KPMG Workforce Opportunity Assessment

helps organizations identify where they can get the most value from their overall AI investment. This tool benchmarks your workforce against a library of tasks and activities. It also recommends which agents to invest in and which parts of the organization to prioritize.



### KPMG Skills Framework

recommends the specific skills employees need to work effectively with AI agents. To navigate this shift successfully, organizations must prioritize upskilling and offer targeted training programs. The KPMG AI Learning Academy provides personalized learning that meets employees where they are, helping ensure they develop the skills to thrive in an AI-driven future.

## 02

### Reshape your organization

Seamlessly incorporating the new digital labor requires reshaping your organization. KPMG works with you to:

- Identify capabilities and impacts, then redefines roles for new ways of working
- Set strategic plans and provide leaders with tools to engage their teams and boost performance
- Shift roles and operating models to improve effectiveness, efficiency, and experiences and deliver organizational value.

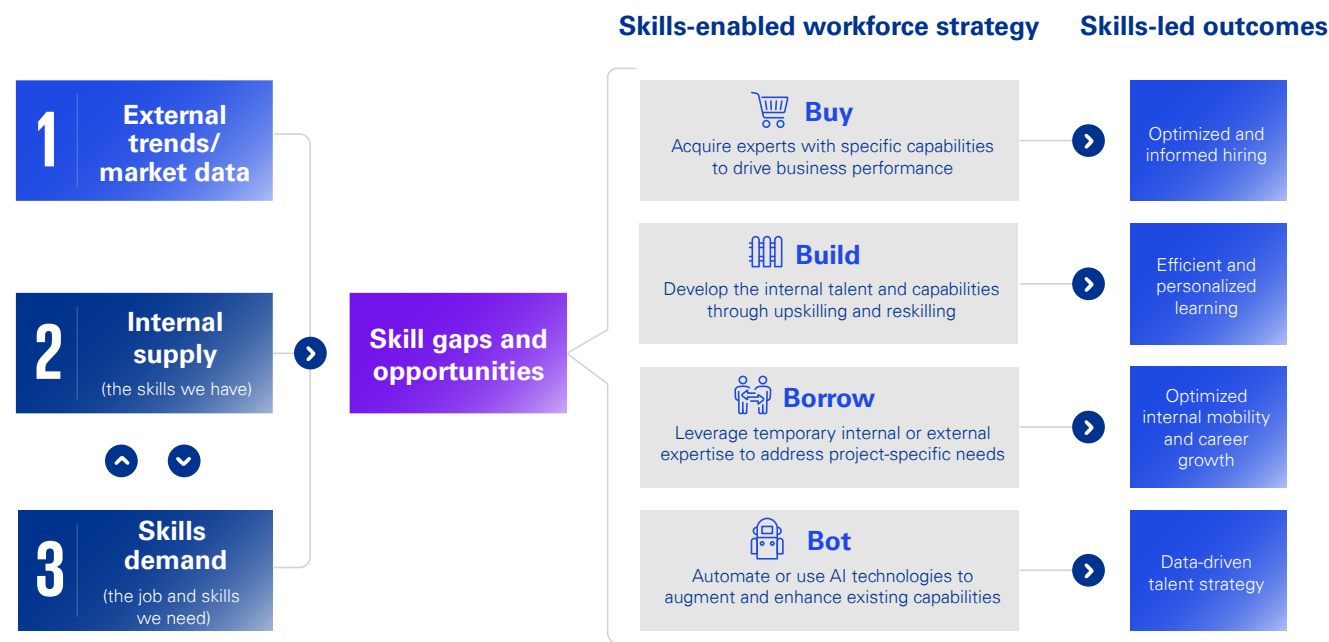
Employing a human-centric approach to role redesign uncovers the potential friction of digital platform integration, disconnected systems in the flow of work, and data, risk, and compliance complexities that can affect adoption.

For example, the **KPMG Strategic Workforce Planning (SWP)** methodology integrates concepts from finance, HR, and business operations to help ensure that the workforce aligns with strategic objectives and operational needs. The process helps clients plan for the workforce they will need in the next several business cycles. Ultimately, workforce planning helps determine whether your organization has the right human and digital labor mix for the near and longer term.



Understanding the skill gaps at your organization

Having a clear view of your skill gaps and opportunities will enable you to make more informed and better workforce planning decisions, and thereby realize savings, productivity, and efficiency gains.



While reshaping the organization, KPMG works closely with Salesforce to design the roles, responsibilities, and topics required for each agent. Organizations can use Agentforce to deploy prebuilt agents or create their own with no-code, out-of-the-box templates. Agentforce integrates seamlessly with other Salesforce tools, allowing customers to extend the functionality of each agent with preoptimized workflows, actions, and supporting data.

03

Augment your workforce

In augmenting the workforce, KPMG helps clients:



Activate and engage employees to adopt new ways of working with Agentforce



Track and measure value realization



Enhance the workforce strategy aligned with strategic goals and people objectives

KPMG helps companies design a human-centric change strategy and plan to adopt agentic AI solutions like Agentforce and overcome common adoption hurdles, such as gaps in:

- **Skills**—People don't know how to use AI tools effectively.
- **Motivation**—People are not convinced that using AI is in their best interest or will deliver the promised results.
- **Innovation culture**—Peers, teams, and leaders may not encourage the use of AI and make the right tools available.

KPMG helps leaders align on a strategic vision for the future workforce, how it will be reshaped and enhanced with AI, and clarify what this means for the in-scope functions and individual roles.

It is important to continually evaluate the effectiveness of the digital workforce, identifying opportunities to enhance agent roles, responsibilities, and guardrails. Performance metrics should be regularly tracked and reported and organizational roadblocks identified.

The value of Agentforce can best be sustained by driving an innovative culture, incentivizing creative ways of working, delivering continuous AI learning, and amplifying successful outcomes for employees and customers.



# Achieving success with KPMG and Salesforce

KPMG is one of the first strategic alliances with Salesforce to help clients say “yes” to agentic AI with dedicated methodology, tools, and more. KPMG helps organizations enhance tools like Agentforce by taking a human-centered approach to understanding which agentic capabilities to introduce, how to reshape the roles of current team members, and how to drive change and adopt new ways of working.



KPMG is one of the fastest-growing Salesforce and customer relationship management partners.<sup>1</sup> In only four years, we have earned 1,500+ Salesforce certifications across 500+ customer solution and experience practitioners.



KPMG is also one of the first alliance partners to collaborate with Agentforce in creating industry-focused incubators.<sup>2</sup> These touring innovation laboratories offer an immersive approach to help organizations leverage agentic AI capabilities effectively. The KPMG AI Incubator is a launchpad that, combined with other proprietary tools alongside Agentforce, offers the potential to transform customer interactions, streamline operations, and provide personalized services at scale.

In combination with our other accelerators, assets, and tools, KPMG helps build the business case for a human-centered approach to Agentforce. By bringing together leading technologists and innovators from Salesforce with industry and functional specialists from KPMG, we help clients harness the power of AI to drive business growth and transformation.

<sup>1</sup> Press release, “KPMG Commits to Building a Future of Artificial Intelligence with Salesforce,” September 2023.

<sup>2</sup> Press release, “KPMG Launches new AI incubator for Salesforce Agentforce,” December 2024.





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