BEST PRACTICE REPORT

Align Skills With Your Agentic Progression: The Foundation Of Your Agent Experience (AX) Program

Customer Service Is A Great Place To Start

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Summary

Forrester has well documented current and impending skills gaps related to agentic AI. The harder question is, What can enterprises do about it? This report outlines a skills prioritization approach that starts by separating today's necessary skills into groups of those that are declining in importance, those that should be terminated or outsourced, those that need to incubate, and those that are essential for the future.

The Biggest Hurdle Isn't Building The Agents; It's Preparing Humans

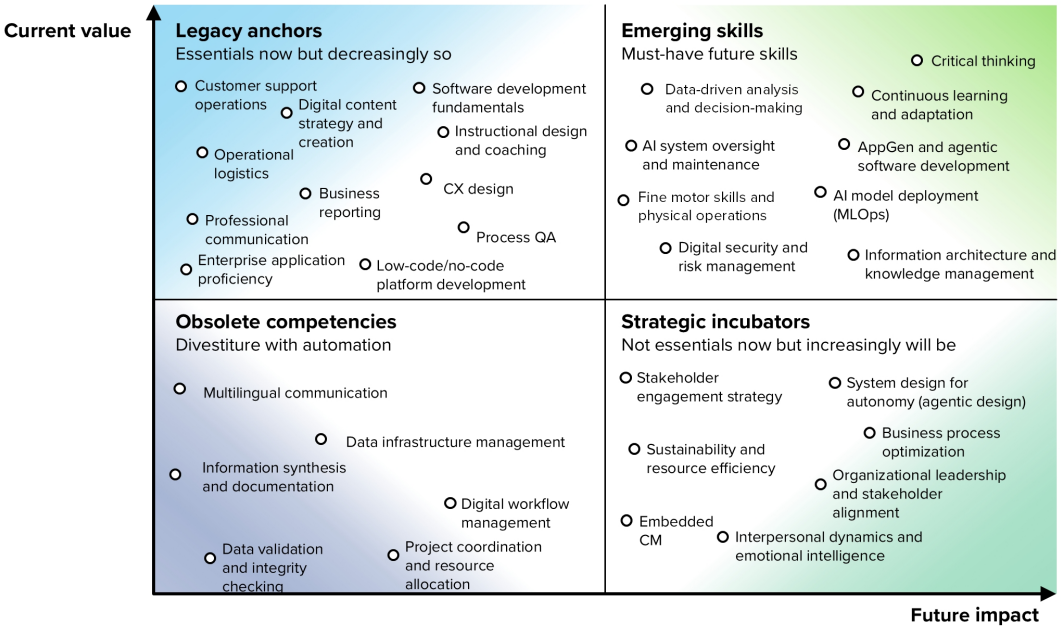
Forrester's March 2025 Consumer Pulse Survey showed that 62% of online adults who had used or heard of genAI worried about their jobs. Enterprises are unprepared for the degree of transformation AI agents are triggering. Employees and their managers do not understand how to design, supervise, and integrate AI agents into their work patterns. The uncertainty of agentic progression and limited understanding of required AI skills are compounding this. In this report, we present a skills prioritization framework that serves as a first step to bridge that gap (see Figure 1). It can help:

- **Provide a frank assessment to prepare for what's coming.** Companies will spend nearly $5 on services, change management, and skills development for every $1 spent on AI agent licensing. The first step is a comprehensive forward-looking skill-based assessment of the existing workforce to chart the progression path and define target competencies. A large life and annuity company surveyed the readiness of managers to adapt to AI's progression and found that fewer than 25% were prepared.
- **Focus on skills instead of (complicated) competencies.** While skills and competencies are sometimes used synonymously, they have different definitions and uses. Making the distinction will help you parse out what needs to change in your skills inventory and workforce roster. Because competencies contain a swirl of skills, knowledge, attributes, and proficiency levels (e.g., beginner to advanced), they are helpful artifacts but difficult tools to use. No surprise is that many modern enterprises use skills as more granular pieces of data instead of complex and nuanced competencies in these kinds of exercises.
- **Break skills into actionable categories.** Forrester has documented the current and looming skills chasm driven by emerging agentic AI. For example, 41% of AI decision-makers included new skills in job descriptions when hiring talent to support AI projects. The diagnostic phase is complete; the challenge now pivots to prescribing actionable enterprisewide strategies to bridge this gap. It helps to segment competencies into actionable categories by their current utility, their future relevance, and the pace of AI agent adoption. Because skill development through training requires lead time, leaders must identify the necessary competencies and precise timeframe that they need (e.g., when AI agents become the controlling entity for a specific work process). Isolating skills and their corresponding tasks into a portfolio framework allows organizations to manage these lead times effectively and align human development with progression logic.

- **Chart a learning path, not just a one-time training course.** Yes, AI skills are new, but skills development is not. It is well understood that you should draw on resources such as your learning and development team to plot your course. But it is a course — a journey, not a single event. You have to build a learning program, not just a singular training incident. And don't forget that learning program success depends entirely on organizational infrastructure and culture. That means making sure learning is not just something people talk about but embedded in values, development plans, and performance. This takes time and resources.

Figure 1

General Skill Categorization For Future Human And AI Agent Collaboration



Our Skill Development Framework Aligns Skills With Agentic Progression

Constructing a reskilling timeline requires a targeted discussion of specific workforce skills. While many skills are common across an organization, effective categorization must focus on specific operational domains or use cases, especially the specific proficiency levels needed. Skills intelligence technology can help identify what skills people have and then use AI to calculate time to proficiency and construct learning paths using available learning courses, coaching, mentoring, and shadowing

opportunities. But even without purpose-built tech, you can make a lot of progress. We break down the skills into four main segments.

Emerging Skills: Must-Have Skills That Will Define Future Success

These skills are critical for success today and projected to remain essential or grow in importance. They represent the vital, healthy skills of the organization as agentic AI progresses. Together with proprietary domain knowledge, process flows, and trade secrets, these skills will ultimately provide competitive advantage. This is the must-build category, and you should:

- **First institute broad AI skills assessment and development plans.** An effective AI skills assessment and development roadmap must be domain or even role specific to be truly actionable because learning impact increases as it matches the learner's context. Oftentimes, management does not understand the maturity of the enterprise relative to AI or the importance of a skill focus. To evaluate the strategic capability of your workforce, first review Forrester's AI quotient (AIQ) research. Then take the AIQ online assessment tool to measure how effectively individuals, teams, and organizations can adapt to, collaborate with, trust, and generate business results from AI.
- **Move from reactionary to continuous learning (CL).** Only 50% of employees had established a structured training curriculum for working with automation technologies. CL and adaptation are some of the most important emerging competencies to develop. CL supports the organization and goal attainment needed for many other emerging competencies. It can help develop a broad range of skills with a disciplined framework to organize future required competencies, align it to a person's skills, and assess its impact. The goal is to develop more effective and engaged employees by building the knowledge, skills, and process expertise required to excel in the future.
- **Stay sustained and accelerated.** Maintain maximum investment in learning and development R&D, recruitment, and process integration for these skills. Skills such as data-driven decision-making (e.g., making inferences from small datasets) is something AI is not good at but your workers can be. Model development and maintenance (ModelOps), information architecture, and knowledge management are emerging competencies that result from advancements in genAI. These competencies should be standardized across the organization. Showcase available learning pathways, mentorship programs, and career progression frameworks to engage people in emerging skill areas. For example, there are vendors that provide skills assessments, upskilling, and reskilling resources in

specific areas like security and risk management that you should review.

Legacy Anchors: Skills That Are Critical But Soon To Be Obsolete

A challenge in skills migration is dealing with the paradox of high-utility and low-longevity competencies. For example, many tasks are essential for operations today but first in line for automation by the next wave of AI agents. These are your maintain-only skills with decaying value that are projected to be less relevant in the future. They are rarely unique — you need them to compete, but everyone else has them too. Make sure to:

- **Invest only in minimal mandatory training to keep legacy systems operating.** Many legacy anchor skills support existing business applications. Your workforce mastered skills to learn cryptic interfaces as well as interpret and correlate isolated datasets. These will have less importance as AI interfaces present information from natural language queries and AI agents absorb business logic and take on a greater orchestration role. Note: These skills will still have a role for some time, particularly in regulated industries.
- **Reduce investment and skill development for roles that AI agents will disrupt.** A vast swath of support operations and operational logistics competencies will be deemphasized. However, exercise caution. One digital payment provider reduced support skills too aggressively and had to rehire humans to correct course. High-coordination, clipboard-driven tasks centered on logistical coordination (e.g., managing vehicle fleets, scheduling maintenance crews, optimizing delivery routes) will quickly vanish and be prime targets for worker and executive agents. Similarly, digital content strategy and development for creative domains like marketing and media (e.g., drafting template emails, generating routine social media posts, performing basic video editing), while essential today, will decline in importance. Advanced marketing automation platforms will integrate creative agents, automating much of the low- to mid-complexity production workflow. Consider contract experts or business process outsourcing providers to augment your capabilities.
- **Use automation to maintain, sunset, or replace apps that require declining competencies.** Legacy anchor skills are critical to running profitable business lines today but will be replaced by automation that no longer requires them. Invest in robotic process automation (RPA), digital process automation, application generation, and AI agents to move business logic and functions that leverage these competencies outside of aging technical platforms. Work with your automation center of excellence (COE) to execute a blended skills and technology

review that helps prioritize removal of these noncore competencies that lack differentiation.

Strategic Incubators: Skills That Need Curation And Development

These skills grow in importance over time and tenure. They have limited immediate application and low utilization today by the front line, but they are expected to become strategic differentiators or important skills for customer-facing employees in two to five years. You should:

- **Incubate and pilot critical soft skills.** Invest selectively in small, dedicated teams or innovation pods. For example, organizational leadership and stakeholder alignment will become more important for managers over time. Leadership storytelling will be an important communication skill to inspire teams to change behaviors and influence decisions. Change management also falls into the strategic incubator category and, while needed today, will require new emphasis and revised program development. There are vendors that specialize in assessing and developing these critical leadership and human skills, configurable to an organization's nuanced approach.
- **Nurture agentic skills.** Building agentic systems will require training in new AI frameworks and architectures. But applying a broad training program for designing agentic processes would be premature today because needed methodologies to design autonomous systems are still evolving. Skills for autonomy (agentic design) must be cultivated and developed. Likewise, business process transformation capabilities must incorporate new methods that today are nascent disciplines. Mandatory high-priority internal upskilling programs with deep investment in these competencies will pay off. Fund proofs of concept (POCs), pilot programs, and external research/partnerships. Focus on deepening expertise, not broad training.
- **Develop embedded change management to navigate the four-quadrant skills shift.** Managers are the primary conduits for change and must possess enhanced relational competencies (e.g., empathy and active listening) with the added responsibility to help employees develop in their current role with an eye toward career progression. Embedded change management is considered an incubator skill because it must transition from a discrete siloed program to an embedded capability in all managers to guide employees through the four-quadrant skills framework. Skills intelligence tools can identify individuals currently well suited to roles by their skill profiles and suggest learning paths to remediate skill gaps or alternative roles that better fit their abilities.

Obsolete Competencies: Skills That No Longer Drive Differentiation

These are often legacy skills that organizations should have retired but retained due to slower-than-expected digital transformation. Agents will quickly scoop up data entry, note taking, translation, and many reporting skills, providing little differentiation. You should:

- **Divest from these skills.** Low business value and limited future impact characterize skills in the obsolete zone. These older skill categories have reached a point where their business value has dropped. Enterprises should look for newer, higher-value replacements and divest from these categories. Put more bluntly: Do not invest in training or replacement hires for these skills. Actively seek to automate or outsource processes dependent on them.
- **Schedule AI agent POCs to replace these competencies.** Skills in this category, like information synthesis and documentation, digital workflow management, and multilingual communication, will quickly give way to AI agents, RPA agents, or basic digital transformation. GenAI-infused agents will require little training to handle this workload.
- **Carefully discuss divestment plans with existing employees.** There are more employees using obsolete skills than using skills in emerging or strategic incubator quadrants. Their jobs often depend on training to untangle complex applications, drive manual steps, and wade through poorly documented policy and procedures. In many cases, these are longer-term employees who are not the most adept at technology support, but they may have untapped skills you can leverage elsewhere. Opportunity marketplaces can highlight available roles and provide skill-match recommendations to employees whose role is disappearing. Otherwise, a formal talent redeployment or reduction may be necessary.

An Example: Making Skill Progression Actionable For Customer Service

Customer service is a fertile area to address skill progression challenges because AI agents are already having an impact. AAA Washington lets AI agents handle tow-truck dispatching and member updates autonomously to support more than 1.5 million roadside assistance requests a year. Anthropic uses AI to answer complex and unique support inquiries from a massive customer base that spans everyday consumers using free Claude accounts to enterprises using its SaaS and API products. About 1,700 hours were saved from contact center labor after a single month of usage, with more than a 96% engagement rate from its customer base. These examples are in line with attitudes

about AI in the contact center. A competencies framework is essential for contact centers to:

- **Identify today's skills that will become obsolete.** In a recent Forrester survey, 31% of global information workers in contact centers anticipated AI would automate routine tasks and straightforward questions, enabling them to redeploy staff to more value-added roles without increasing headcount. And 34% expected that AI would allow them to handle more volume via business growth without needing more agents. Many competencies for these tasks are obsolete today or will soon be legacy anchors. Note that some legacy anchors such as workforce management (WFM) require a broad knowledge of skills needed for human agents and track them by the hour. These are critical to understand to forecast the changes in skills as more work gets automated, but few WFM tools are equipped to send that skill data anywhere.
- **Make agentic progression estimates.** Contact center jobs will change and new ones will emerge — but not all at once. Workers (not necessarily within the contact center) will continue to support high-risk, high-value interactions, but there will be far fewer of these interactions than today. Companies will transition interaction volumes to AI gradually and move from deterministic solver agents to autonomous executive agents, changing the profile of human jobs. For example, relationship managers who have a mix of sales and customer service skills will forge meaningful connections with customers. Subject matter experts will be dedicated to complex exceptions. Organizations must systematically break down tasks and incrementally assign work to advancing AI, defining the exact moment when human functions become obsolete and where human-in-the-loop skills are needed for agentic progression (see Figure 2).
- **Build your skill progression.** Soon, sophisticated AI agents will fully support complex customer queries, replacing a vast swath of tier-one human customer service generalists as well as first-generation chatbots and rule-driven automations. Smaller digital-first companies with less legacy technology and operational burdens will see this shift earlier than larger enterprises that have just started their AI journey. Regardless, all should place skills in one of four segments (see Figure 3).

Figure 2

AI Agent Task Progression For Customer Service

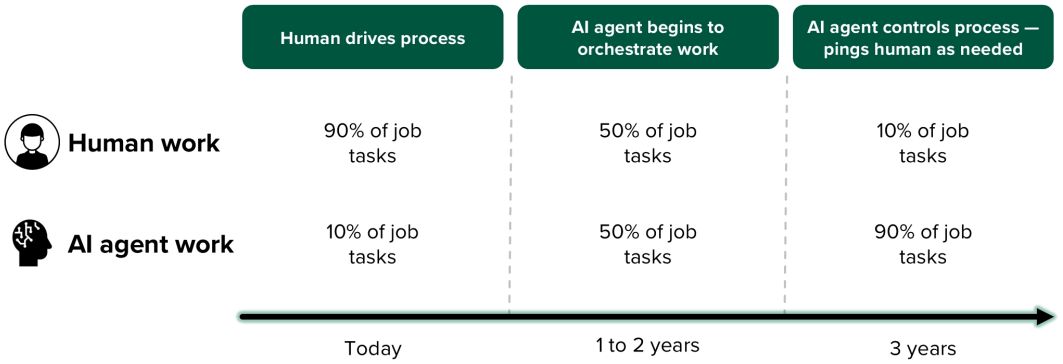
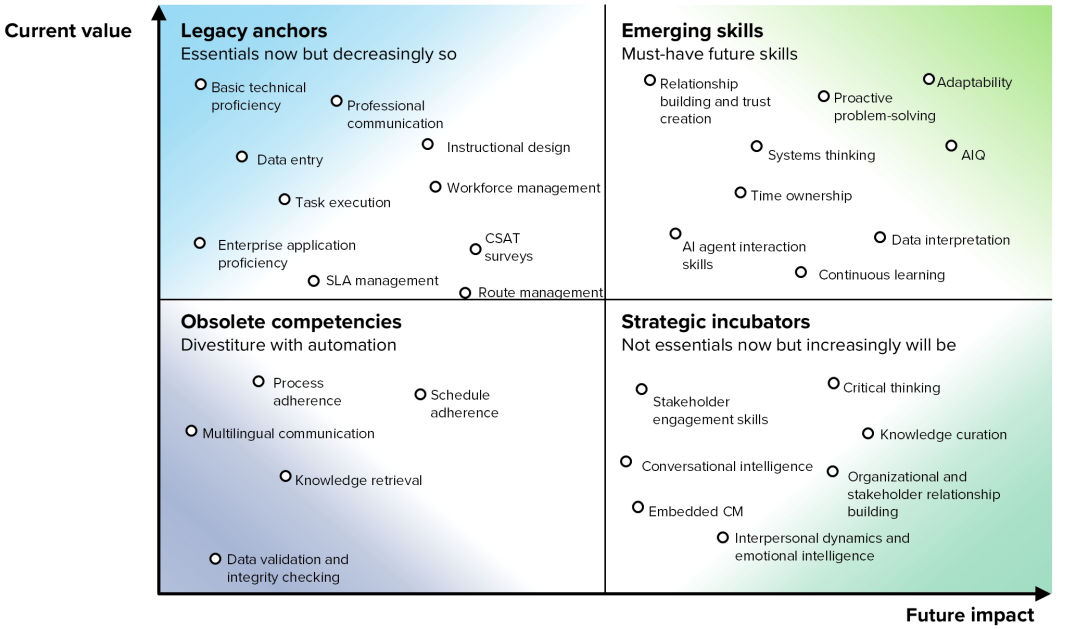


Figure 3

Skill Categorization For Customer Service



The Hard Part Of Agent Experience (AX) Is How To Get There

While the skill framework provides the destination, the actual journey is a psychological and operational challenge. In any department, you'll typically find a 20-20-60 split: 20% are early adopters who are eager to evolve, 20% are legacy resistors who cling to their comfort zones, and the critical 60% majority are wait-and-see observers who could tilt in either direction. Scaling this to a 1,000-person customer service center means 600 people are currently idling in the middle. Without a decisive strategy to move them from obsolete tasks to emerging ones, your transformation will stall before it starts.

Start With A Five-Step Skill Prioritization/Sorting/Categorization Approach

The following five steps build from a specific use case, ensuring alignment with IT, engagement with workers, and an actionable program launch (see Figure 4). You should:

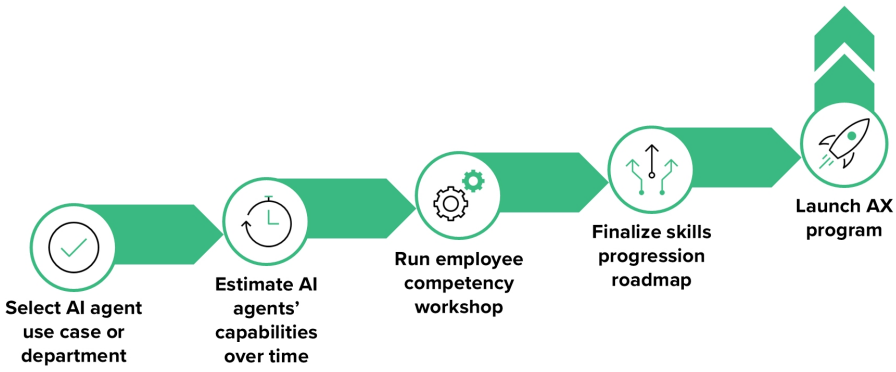
- **Select a target AI agent use case or department.** Using Forrester's use case research, select a department that will be a quick win for an AI agent solution. If possible, select workers with some exposure to AI models or a positive attitude about automation.
- **Work with IT to estimate the AI agents' capabilities over time.** This estimation allows you to identify the breakdown of work between humans and agents. Reassess this balance as the agents mature. Encourage your automation teams (leveraging a COE) to take a human-first user experience approach that evolves your mandate from technology-first to human-first AX. While COEs are crucial for scaling solutions, integrating AX expertise is necessary to identify employee pain points, specifically for tasks that require legacy anchor and obsolete competencies that may be designated for automation. Work with your COE to implement a blended competencies and technology review, prioritizing the elimination of noncore undifferentiated tasks and competencies.
- **Run an employee competencies assessment workshop.** By bringing workers together to directly address the skills challenges created by the advancement of AI, organizations can foster a proactive culture of adaptation. This approach begins with an overview of the AI landscape and imminent workforce shifts, followed by an interactive exercise where participants populate a blank four-quadrant skills framework. This collaborative method generates rich discussion, engages employees in architecting their own professional futures from a change management perspective, and provides the ground-level insights necessary to

build a robust data-driven skills progression roadmap.

- **Finalize a skills development roadmap.** Shared accountability and collaboration among workers, business, technology, HR, and learning are essential for a successful skills development program. A cross-functional team must start with the end in mind, clarifying the business outcomes of a successful development program before disseminating training and other learning opportunities. Although adults learn best through experiences, they also need freedom and safety to make mistakes, fail, and try again. If that level of risk is not acceptable on the job, then you need to provide learning environments that closely approximate the work they'll be doing.
- **Launch your AX program.** Collaboration is essential to build your AX program. Managers will need to support skills development and give them time to upskill or reskill. Operations leaders who understand business outcomes and IT staff who understand progress toward agentic agents must work with HR to determine the corresponding human role at each stage of agent growth and address it with change management and skill development. This ensures that skills directly map to the incremental automation being deployed and the human tasks that remain.

Figure 4

Five Steps To Kick-Start Your Skills Progression



Invest In AI Tech To Reach Your Skill Goals

Bridging the gap between obsolete and emerging skills requires more than just a destination: It demands a roadmap to illustrate how. To successfully move the workforce through this transition, organizations must move from manual tracking to

dynamic tech-enabled employee development strategies. By leveraging three pillars, firms can transform their middle-majority workers into agile orchestrators of the agentic era. Be sure to:

- **Implement skills intelligence technology.** Keeping up with the changing landscape of skills requires more than manual effort. Just as AI can manage customer-facing and operational workflows, AI can analyze, anticipate, and manage skill gaps. Ingesting transactions and contextual signals as demonstrations of skills, skills intelligence tools can help you stay on top of emerging skills gaps and point individuals to integrated learning experiences to close their specific skills gaps.
- **Launch internal gig marketplaces.** To move the middle 60%, firms should create internal marketplaces that allow employees to spend 10% to 20% of their week on microprojects in the emerging skills quadrant. By letting a middle-office employee spend Friday afternoons working on a new AI agent pilot, the firm lowers the stakes of failure. This hands-on exposure builds trust and shifts the worker's identity from a manual processor to a technological orchestrator before their old role is officially sunset.
- **Augment training with agentic apprenticeships.** Traditional classroom learning is too slow for the pace of AI. Companies are now pairing workers with the very AI agents that will eventually handle their routine tasks. In these apprenticeships, the human leverages the five most needed AX skills while auditing the AI's output and refining its logic. This learn-by-doing approach creates a feedback loop: The worker gains emerging AX skills, while the AI becomes more accurate.
- **Look into AI coaches.** As emerging tools in the AI space, AI coaches provide feedback, guidance, and suggestions to human users at their request or from a transaction that the coaches can see. Depending on the vendor's capabilities and place in the tech ecosystem, these supportive actions range from roleplaying development conversations before a meeting, pointing employees to learning opportunities, or reacting in real time to case and call performance.

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