CCNG INSIGHTS

Preparing Your People for an AI Enabled Service Workforce

Five leadership priorities for changes in work, skills and accountability

AI can change much more than how a customer gets an answer. It can change which work reaches employees, what supervisors need to coach, how knowledge is maintained, and who is responsible when service breaks down. For contact center leaders, workforce preparation belongs alongside the technology decision from the beginning.

Forrester's May 2026 report, AI Agents Reshape The Customer Service Workforce In Dramatic Ways, describes scenarios in which people take on more specialized work and greater responsibility for directing and improving AI. The pace will vary with service complexity, adoption and organizational readiness. Its workforce projections provide a reason to plan; they do not determine an individual organization's staffing needs.

CCNG's five pillars offer a practical way to examine that preparation. Start with one recurring customer problem, then consider what must change across People, Culture, Performance Management, Technology and Outsourcing.

People Prepare for the work that remains

When routine requests move into automation, the remaining human workload may become harder. Employees can inherit complex exceptions, emotionally demanding conversations and cases that require judgment across policies or systems. A lower contact count alone does not show how many people or which skills the operation needs.

Map the tasks in a selected journey. Identify what AI can support, where employees retain authority, and what happens when the automated path fails. Then define the skills needed for each role. An experienced representative may need more practice evaluating an AI recommendation, recovering a difficult handoff or recognizing when an exception requires escalation.

Build practice into the work. Training attendance is useful to track, but demonstrated proficiency is the stronger test. Ask employees to handle realistic scenarios and show that they can recognize an incorrect answer, exercise judgment and obtain help.

Culture Make participation part of the change

Employees will have questions about workload, career prospects, monitoring and job security. Leaders should explain the purpose of a proposed change, distinguish decisions already made from matters still being tested, and create a reliable way to raise concerns. Promises that exceed what the organization knows will weaken trust.

Include frontline representatives in workflow design and testing. Ask where a proposed process adds effort or removes useful discretion. When employees identify a problem, show what happened next. That visible response helps establish that participation can improve the implementation.

Cross-functional support matters too. Operations may depend on HR for development time, IT for integration, Finance for benefit assumptions and another department for the underlying process fix. Name those dependencies early and agree on who can resolve them.

Performance Management Measure resolution and usable capacity

An automated conversation ending does not establish that the customer's problem was solved. A faster task does not establish that the operation gained usable capacity. Both claims need evidence from the surrounding workflow.

Use a small set of measures that follows the customer's intent across channels: successful completion, repeat contact, handoff quality and employee effort. Pair those with total operating cost, including knowledge maintenance, oversight, training and rework. Compare the pilot with a defined baseline and look for differences among customer groups and case types.

If AI saves preparation time, decide how that time will be used. It might support better case investigation, coaching or additional completed work. Measure the chosen outcome before treating the estimate as a staffing or financial benefit.

Technology Give people reliable knowledge and clear authority

AI depends on the information and processes it uses. Inconsistent policy content, outdated answers and unclear ownership can undermine both employees and automation. Improving the knowledge source can help the team even before a new AI capability is introduced.

Assign owners for the answers that matter in the selected journey. Establish how corrections reach the source, how material changes are tested and who can pause an automated action. Make sure the employee receiving an escalation has the customer's goal, relevant history and actions already taken.

Test failure as well as normal operation. The team should know how to maintain service when AI is unavailable, provides an unreliable answer or sends more work to people than expected.

Outsourcing Revisit the responsibilities behind delivery

For organizations using service partners, changing work creates new questions about scope, expertise and accountability. This is a CCNG application of the workforce discussion, rather than a sourcing conclusion established by the Forrester report.

Clarify who maintains knowledge, trains people for complex escalations, monitors quality, provides operational data and responds to incidents. Review how pricing and performance commitments account for a changing case mix and the continuing cost of oversight. A shared dashboard is useful only when both parties can act on what it reveals.

Begin with one journey and one decision

Choose a recurring service problem where the team can establish a baseline and test a focused change. Record the work that will change, the skills employees need, the concerns to address and the person accountable for the result. Agree in advance on what would justify expanding, revising or stopping the test.

CCNG connects useful content with practitioner conversations and relevant peer expertise. Members can use the companion AI Workforce Readiness Worksheet to prepare their leadership team, identify gaps across the five pillars and bring a focused question to CCNG. Contact your CCNG representative or visit CCNG.com to discuss your current challenge.

Research reference

Kate Leggett and Laura Ramos, with contributing analysts. AI Agents Reshape The Customer Service Workforce In Dramatic Ways. Forrester Research, May 7, 2026, particularly pages 2–5 and 8–12. This article provides CCNG's original interpretation and recommendations. No report charts or proprietary staffing models are reproduced.