

# An intelligent agent serving the future of pensions:

## A Case with Agentforce



When a person inquires about the status of their pension, they're not just seeking information; they're seeking peace of mind. They expect a clear and timely answer about the future they've built through their hard work. For an institution like **Pragma**, whose mission is to accompany its clients on that journey, managing that expectation is fundamental.

But what happens when the volume of inquiries exceeds the capacity to respond?

### A challenge that couldn't wait

One of the leading Financial Services Companies and Pension and Severance Funds Administrators in Colombia has worked to become the main ally of its clients in the construction and management of their assets since 1991.

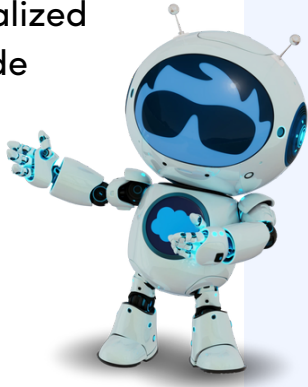
It receives an average of 2,000 monthly requests related to the status of pension claims. In that scenario, the customer service team managed to handle about 480 cases each month. The most complex ones, such as tracking a financial benefit or the status of a pension application, consumed up to 20 minutes per request.

This situation created a significant operational burden and, most importantly, service delays. Without a scalable solution, the process dragged on, affecting the user experience and service efficiency. The challenge was clear: to optimize the management of these requests and deliver valuable information in the shortest time possible.

### What could an agent do for this company?

This is how we shape the future with AI!  
To meet this challenge, we implemented an intelligent agent using Agentforce, an autonomous and proactive solution from Salesforce. This is not a chatbot, but a specialized assistant that consults pension case data to provide natural language answers to service advisors. In a nutshell, this was the first Agentforce agent in Latin America.

This agent was designed to understand the stages of this company's business flow: from case filing and normalization to contribution collection and the final benefit definition. This allows advisors to quickly and accurately check the status of each request.



### Five steps to ensure a perfect solution's architecture

To ensure the agent's accuracy and consistency, we designed methodical prompts (instructions). These define the context, rules, and constraints the model must follow. Its architecture is based on five key elements:

- Initial context:**  
The agent's role as an expert advisor is defined, and it is provided with relevant case information, including client data and the details of their request.
- Additional data:**  
We integrated the agent with Data Cloud, which acts as its knowledge base. This ensures the agent only generates responses based on this reliable source of information.
- Instructions and logical conditions:**  
We established specific validations. For example: "if the case meets conditions X and Y, provide response A; otherwise, respond B."
- Style and tone guidelines:**  
We defined the type of language and the words it should use to ensure clear communication aligned with the brand's voice.
- Final response:**  
Detailed instructions were given on how to structure the response, including greetings, specific information, and the steps to take if conditions were not met.

#### How does it work?

The flow is triggered automatically when a case enters the "In Progress" status. At that moment, the system queries the client's data in Data Cloud, executes the prompts according to the request's status, and generates a response.

Then, it creates a PDF template that is emailed to the client. Finally, the case is marked as "pending resolution," allowing a human advisor to review the response before final closure.

### The impact: business and people-centricity method

With this solution, the pension fund not only improved its operational efficiency but also transformed its customer experience, offering faster and more satisfactory answers.

- For the business: efficiency that translates into growth**  
The average handling time for cases managed by the intelligent agent dropped from **20 minutes to just 1 minute**, approximately 63 consultant hours of work have been freed up each month.  
  
This time is now dedicated to more complex cases requiring expert human intervention. For the second version, the agent is expected to autonomously resolve 30% of all cases.

- For the people: answers that arrive on time**  
By reducing the time spent on recurring inquiries, service advisors can focus on cases that require deeper analysis.  
  
This not only speeds up response times overall but also improves the scope and quality of service, directly impacting user satisfaction.  
  
Agility and accuracy translate directly into a better customer experience for the fund's customers. Clients receive the information they need about their benefits much more quickly, increasing their satisfaction. By receiving timely and accurate responses, clients feel more secure and confident in managing their financial future.

### Technology with a purpose: our belief

This case demonstrates that technology finds its meaning when it solves human problems. It's not just about automating processes, but about freeing up people's talent so they can focus on what truly matters. In the end, improving people's lives is about just that: turning a long wait into a timely answer, and transforming uncertainty into peace of mind.

Sectors such as banking, insurance, and pensions process data and numbers, but they also manage the dreams, peace of mind, and individual effort of millions of people who work hard to achieve, in this case, a dignified and secure retirement. In these scenarios, technology and artificial intelligence can continue to build companies in which people really trust and make available resources saved for a long time. This is the way to build a fair and secure society with a truly futuristic outlook.

### About Pragma

-  **29+ years** of experience
-  **1,100+** Pragmatics
-  **1,000+** projects delivered
-  **200+** Clients
-  **10** Countries



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