

How Mony Group Delivers Secure, AI-Powered Customer Support at Scale with Intercom and SendSafely

 MONY
GROUP

In an industry where compliance, data protection, and customer trust are paramount, UK-based financial services provider Mony Group has taken a bold step: go all-in on AI-first customer support, powered by Intercom's AI assistant, Fin, and secured end-to-end with SendSafely. With a workforce of just over 500 employees supporting millions of customers nationwide, the company knew it needed a smarter way to manage support operations, especially with rising customer expectations and increasing regulatory oversight.

From Call Center to Chatbot: A Digital-First Transformation

When Mony Group acquired a business already using Intercom, the team quickly realized its value. Compared to traditional support platforms, Intercom offered superior automation, an intuitive customer experience, and seamless extensibility through APIs.

Customer: Mony Group
Industry: Financial Services
Employees: ~550
Support Agents: <12
CS Conversations/Month: 25,000
Key Tools: Intercom
Fin (AI)
SendSafely

Mony Group committed fully to an AI-powered support strategy using Fin, Intercom's AI assistant. Now, 98% of customer conversations begin with Fin, and 65% are resolved without needing a human agent. This shift from email and phone to AI-led messaging allowed the company to transition away from its call center model, while supporting 25,000+ monthly conversations with fewer than 12 agents.

"Intercom is agile, powerful, and simply a better user experience for our customers."
— Lee Burkhill, Project Manager, Mony Group



The Challenge

While Intercom streamlined the support experience, another challenge loomed: secure document exchange. As a provider of regulated products like insurance and financial services, Mony Group operates under the close scrutiny of the Financial Conduct Authority (FCA). Every six months, Mony Group undergoes rigorous FCA audits, requiring detailed evidence of how it handles complaints. The company must also work with entities like the Energy Ombudsman (Ofgem) and comply with GDPR.

When handling sensitive customer data for identity verification, including photo IDs and proof of address, and responding to DSARs (Data Subject Access Requests), the team needed to:

- Ensure secure collection and delivery of documents
- Scale customer support through digital channels
- Replace outdated, manual, and insecure processes like SFTP
- Meet mobile-first customer expectations
- Maintain full compliance with GDPR, FCA, and Ofgem mandates

With their new, highly efficient customer support model, the team needed a secure, compliant way to manage document exchange. That's where SendSafely came in.

The Role of SendSafely

As Mony Group committed to Intercom, they knew they needed a secure file transfer solution that integrated natively with their new support channels. SendSafely quickly became the backbone of secure communications within their customer operations team. SendSafely is now used across all Intercom channels, email, chat, and tickets, enabling the secure collection and delivery of sensitive documents for a range of critical processes.

- **Identity Verification:** Customers upload photo IDs and address proofs to confirm identity before accessing services.
- **GDPR Compliance:** The complaints and escalations team relies on SendSafely for secure outbound delivery of DSARs, deletion confirmations, and data access requests.
- **Partner Data Sharing:** With SendSafely Workspaces, Mony Group securely shares sensitive information with third-party partners like TransUnion, replacing slower, more cumbersome, and less secure SFTP workflows.

"We use SendSafely across all Intercom channels: email, chat, and tickets."

— Lee Burkhill, Project Manager, Mony Group

For more information on how your business can benefit from SendSafely or to start a free trial, go to www.sendsafely.com or email sales@sendsafely.com.



Key Benefits

One of SendSafely's key advantages for Mony Group is its usability, particularly on mobile. With 60% of their customers reaching out via smartphones, having a secure upload process that works smoothly across devices is essential. Customers can easily upload required documents through Dropzones embedded in the Intercom flow, giving the support team everything they need to assist, verify, or resolve a request, without resorting to back-and-forth emails or unsecured uploads. Key SendSafely features include:

- Full support across **all Intercom channels**: email, chat, and ticket forms
- **A seamless mobile experience** (important as 60% of users interact via mobile)
- Compliance readiness for **FCA and GDPR audits**
- Secure file handling for inbound and outbound requests
- Intuitive use for support agents and external partners alike

"Workspaces significantly improved our data sharing with partners like TransUnion, replacing a less efficient SFTP process."

— Lee Burkhill

Conclusion

In combining cutting-edge AI with secure document workflows, Mony Group demonstrates that digital transformation doesn't have to come at the expense of trust or regulatory rigor. Mony Group's modern customer support strategy, anchored in Intercom and fortified by SendSafely, proves that highly regulated organizations can achieve both efficiency and security at scale. With fewer agents, faster service, and stronger compliance, the company sets a new bar for digital-first financial services.

"When we knew we were going with Intercom, we knew we needed to integrate SendSafely"

— Lee Burkhill



FCA & GDPR
Compliance Ensured



Full support across
All Channels

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