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PUTNAM INVESTMENTS RECOGNIZED FOR OUTSTANDING TOTAL CLIENT EXPERIENCE FOR TENTH CONSECUTIVE YEAR

DALBAR is excited to announce that **Putnam Investments** has earned the **Total Client Experience Award** for 2020. This award recognizes Putnam for their outstanding telephone support to mutual fund shareholders, including both their interactions on the phone and the behind-the-scenes processing of customer requests. This is the tenth consecutive year in which Putnam has been recognized with this prestigious award.

According to DALBAR Director Brendan Yeager, “Putnam Investments has made the experience of their shareholders a top priority. This begins with providing excellent service on the phone, building a great relationship, communicating effectively, accurately providing all relevant details, and managing the flow of the call. But that is not all there is to it. What happens behind the scenes after the call also matters. Putnam shareholders can rest assured that their requests are being promptly and accurately processed.”



In order to qualify for the Total Client Experience Award, Putnam Investments underwent a thorough year-long audit of their shareholders’ telephone service experience. This begins with a review of the service interactions themselves, to ensure that the customer received world-class service during their call. Beyond the call, DALBAR reviewed security procedures, the accuracy of information provided, and followed all transactions through to completion to ensure that they were processed accurately and within the time frames quoted. DALBAR’s Total Client Experience criteria are based on more than three decades of experience within the financial services industry, combining industry standards, best practices, and leading research to ensure that customers are receiving an exceptional, well-rounded experience from the time they pick up the phone until their requests are completed.

For more information about [DALBAR Awards](#) and other [Customer Experience Audit programs](#), please contact Brooke Halloran at 617-624-7273 or bhalloran@dalbar.com.

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