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PUTNAM INVESTMENTS EARNS DALBAR TOTAL CLIENT EXPERIENCE AWARD

Delivering a Superior Standard of Care to Mutual Fund Shareholders

Today DALBAR announced that Putnam Investments has earned the Total Client Experience Award for the ninth consecutive year. This distinction recognizes Putnam for consistently delivering an exceptional service experience while also providing accurate information and precisely executing transactions for shareholders through their mutual fund contact center.

In order to earn this prestigious award, Putnam underwent a thorough and independent year-long audit. This audit included a review of actual customer interactions, including a review of the all specific information provided during the course of the call. The audit also included a behind-the-scenes review of all transactions initiated, following them through to completion to ensure that they were processed accurately according to the customer's instructions.

DALBAR Director Brendan Yeager explains the importance of looking at the overall client experience, "More and more companies are coming to appreciate the importance of service as a key differentiator, but service doesn't end when the customer hangs up. To really deliver a superior standard of care, it is critical that all of the information provided to the shareholder was accurate and that any transactions they initiated are processed accurately and in a timely manner. I can personally attest that Putnam is delivering such a superior standard of care."



Specific areas where Putnam representatives performed at a high level include:

- ✓ Ensuring that customers are properly authenticated, thereby assuring account security
- ✓ Having strong interpersonal relationships, including being friendly and attentive
- ✓ Providing both complete and accurate information
- ✓ Consistently executing flawless transactions
- ✓ Communicating effectively
- ✓ Ability to manage the flow of the call

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

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