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Putnam Investments is Recognized by DALBAR for Providing the Total Client Experience

(Marlborough, MA., February 16, 2022) DALBAR is excited to congratulate **Putnam Investments** in earning DALBAR's [Total Client Experience Award](#) for the eleventh consecutive year. This award recognizes Putnam for exceptional support through the contact center, including both what happens on the phone, and the processing and any other follow-up that the representative completes after the call concludes.

DALBAR Director Brendan Yeager explains, "A large portion of the financial services industry has engaged DALBAR to review what happens on their calls with clients, but Putnam Investments has gone a step further to make sure that every aspect of the telephone service experience is of the highest possible caliber, including what happens behind-the-scenes and after the call is over. Through our auditing we can attest to the great work that Putnam is doing. To earn this award in any given year would be an accomplishment, but to do it every year since our reviews began is a rare feat indeed."



DALBAR invites all firms to check on their performance, as measured by DALBAR, by visiting their [award winner page](#).

The Total Client Experience Award looked at all of the critical aspects of customer interactions with Putnam Investment's shareholder services telephone support team, including:

- **Security** – Were all security protocols followed?
- **Attitude** – Was the representative friendly and engaged?
- **Accommodation** – Did they provide all of the relevant details related to the request?
- **Information** – Were those details accurate?
- **Processing** – was everything processed per the customer's instructions?
- **Expertise** – Was the representative able to communicate effectively?
- **Call Flow** – How did they manage the flow of the call (including holds, transfers and dead air)?

[DALBAR, Inc.](#) has a 45-year history and is recognized by industry and government as an independent third-party expert in the business of providing audits, evaluations, ratings, and due diligence. DALBAR certifications are recognized as a mark of excellence in the financial services community.

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