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DALBAR AWARDS FIRMS FOR BEST-IN-CLASS TELEPHONE SALES SUPPORT

Today DALBAR announced the winners of the **2020 Excellence in Sales Support Award**, recognizing those companies leading the industry in the handling inbound sales calls from the financial advisor community. This year's award winners are:

- ✓ JPMorgan Funds
- ✓ Putnam Investments

"The inbound sales desk is unique in that it blends elements of service and sales into a single role," explains DALBAR Director Brendan Yeager. "Advisors are calling in with specific requests and it is crucial that the sales desk associate be able to meet those needs in an efficient manner. But that is just the beginning of the associate's role. They are there to help advance the sale. I like to think of providing friendly and competent service as the price of admission. Once the associate demonstrates their knowledge and earns the advisor's trust, they are in a much better position to actively sell, whether that means highlighting the company or product's value proposition, ensuring that the advisor has the best marketing materials available, running illustrations, or something else entirely. It is in balancing these dual competing roles that this year's award winners really stand out. By providing an exceptional experience, they have the opportunity to advance the sale, which they are then able to effectively capitalize on. This lets the advisor make the sale, lets the company gain the assets and ensures that the client has the product that is right for them; it is a win, win, win."



The Excellence in Sales Support award can only be earned through a year-long audit of the quality of support being delivered. Companies are evaluated against rigorous criteria looking at both the service and selling aspects of the sales desk's role, ensuring that these companies are providing an excellent and well-rounded experience for the financial advisor.

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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