

## Improving Staff Capability to Strengthen Member Service

Learn how WSECUCU improved member support and staff skills with Money Management Essentials (MME).



### THE CHALLENGE

As employee roles evolved to support more complex, advice-driven member conversations, WSECUCU, a \$5.3 billion credit union headquartered in Olympia, WA, recognized the need for a consistent level of financial knowledge across teams. Employees were increasingly expected to understand a wide range of financial topics and help members navigate decisions that extended beyond basic transactions. Without a shared financial education foundation, it was difficult to ensure consistent guidance and confident referrals across the credit union.

### THE SOLUTION

Three years ago, WSECUCU partnered with AFCPE to offer MME as a core learning opportunity for employees. The goal was to better equip employees to support members' overall financial well-being through more informed and meaningful financial conversations. The course became required for retail operations staff, member consultants, and member solutions team collectors, while also being offered voluntarily to contact center employees and home loan and home equity officers.

### THE RESULTS

#### When Financial Education Delivers Impact:

- 163 employees have completed MME since the partnership began, 52 additional licenses planned.
- Member consultants report stronger overall knowledge and greater confidence when making recommendations.
- Staff are better able to identify where a member is in their financial journey and refer them to the most appropriate services, including investments.
- WSECUCU has continued expanding access, with license use growing monthly and more than 75 employees still needing to complete MME.

### AT A GLANCE

#### Challenges

- Needed consistent foundational knowledge for helping members through financial challenges and planning
- Wanted training aligned with empowerment values

#### Results

- Identified the need for a shared baseline of financial knowledge for key teams
- MME is required for retail operations, member consultants, and member solutions
- Voluntary training for contact center and lending staff
- 75 additional MME licenses planned
- Stronger employee confidence and more effective member referrals



*"Money Management Essentials has helped strengthen our teams' confidence and deepened their ability to support members in meaningful ways. It has been a valuable part of our commitment to empowering people with the right guidance at the right time."*

**Stacy Lucero**

**VP, Deposit & Loan Operations**