



BALANCE Impact Report

■ CREDIT UNION:

SCE Federal Credit Union

- \$738M assets / 56K members
- 10 branches / 185 team members

BALANCE spoke with **Michelle Shelton, Chief Experience Officer, at SCE Federal Credit Union** in Irwindale, CA about Topic Specific Training.

■ PRODUCT:

Topic Specific Training

What is Topic Specific Training?

BALANCE has extensive expertise in many areas of personal finance and financial education delivery. This is expertise that can be packaged specifically for the needs of your staff.

Topics include:

- Credit Scores and Credit Reports
- Budgeting to assist Collection Agents
- Student Loans
- Identity Theft
- Presentation Skills Training
- Train-the-Trainer on any of the 50 workshop topics that BALANCE offers
- Other topics available upon request.

Q: What type of Topic Specific Training did SCE Federal Credit Union decide to offer to the staff?

A: We offered presentation skills training and also train-the-trainer for two of the workshop topics we teach.

Q: Why did you decide to offer this Topic Specific Training?

A: We wanted to be sure that our team members had the training they needed when bringing financial education into the community. Confidence in presenting as an expert is important to our brand.

Q: What did your staff have to say about the presentation skills training and the train-the-trainer program for two workshop topics?

A: I surveyed them upon completion, here is some of their feedback:

“Training was great. A lot of good tips, techniques and best practices shared.”

“The feedback session after I gave my presentation was very helpful.”

“I recommend that more of our team go through this.”

“This training had a high level of participation”

Q: Would you recommend the Topic Specific Training to others?

A: Yes, because BALANCE creates their own workshop content and because financial education and counseling is their core competency, I trust their training programs. We have used the traditional BALANCE program (phone counseling and digital resources for members) for many years, but I am glad we looked into their Topic Specific Training programs to gain the benefit of this relationship for team members too.