

SSA 2022 SPRING

*Conference &
Trade Show*



CONFERENCE PROCEEDINGS

MARCH 9–11, 2022



ROSEN SHINGLE CREEK

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Effective: 9/1/2004

**SSA
ANTITRUST
POLICY AND
MEETING
GUIDELINES**



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***Self Storage Association
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Antitrust Guidelines

The antitrust laws seek to preserve a free competitive economy in the United States and in commerce with foreign countries. As a general rule, competitors may not restrain competition among themselves through understandings or agreements as to the price, the production, or the distribution of their products, or other agreements which unreasonably restrict competition. They may not act in concert to restrict the competitive capabilities or opportunities of their competitors, their supplier, or their customers.

The antitrust laws, however, are often of unclear applicability, and unlawful agreements can be inferred from circumstantial evidence. Furthermore, penalties for violating the antitrust laws are severe. The guidelines, set forth below, are designed to avoid even the appearance of questionable activity. At SSA meetings, the following will not be discussed:

1. Current or future prices.
2. What constitutes a "fair profit level."
3. Possible increases or decreases in prices.
4. Standardization or stabilization of prices.
5. Pricing procedures.
6. Cash discounts.
7. Credit terms.
8. Control of sales.
9. Allocation of markets or geographical division of markets.
10. Refusal to deal with a corporation because of its pricing or distribution practices.
11. Whether or not the pricing practices of any industry member are unethical or constitute an unfair trade practice.

Statement of Policy

It is the policy of the Self Storage Association (SSA) and its members to comply strictly with all laws applicable to SSA's activities. Because SSA's activities involve cooperative undertakings and meetings among competitors, the Board of Directors emphasizes the ongoing commitment of SSA and its members to full compliance with federal and state antitrust laws. A statement explaining this policy is to be distributed at all SSA meetings to remind each member of this commitment and as a general guide for our activities and meetings.

Responsibility for Antitrust Compliance

SSA's programs have been carefully designed and reviewed to ensure their conformity with antitrust standards. Each SSA member has an equivalent responsibility for antitrust compliance. Each business enterprise and SSA depend upon good judgment by all to avoid discussions and activities which could involve improper subject matter or improper procedures-or even an appearance of improper activity. SSA staff members work conscientiously to avoid subject matters for discussion which may have unintended implications, and counsel for SSA provides guidance with regard to these matters. Thus, all concerned have an important and individual responsibility for assuring antitrust compliance in SSA activities.

Meeting Procedures

To avoid even the appearance of questionable activity, as well as to guard against inadvertent conduct, all SSA meetings will be conducted in accord with the following procedures:

1. A written agenda will be prepared.
2. Accurate minutes of every meeting will be prepared, expeditiously sent to the participants, and approved at the next meeting.
3. In case of doubt about the propriety of a topic of discussion, consult staff management or corporate counsel.
4. If a member has a reservation concerning remarks or discussion at an SSA meeting, officially state the reservation; if the discussion is not terminated or resolved satisfactorily, the concerned member should leave the meeting.
5. Rump sessions involving the discussion of business matters should be avoided.

Conclusion

Compliance with these guidelines involves not only avoidance of antitrust violations, but avoidance of any behavior which might be considered improper. Antitrust laws are complex and far-reaching. This statement is not a complete summary of all applicable laws. It is intended to highlight and emphasize certain basic precautions designed to avoid antitrust problems. In case of doubt, seek the guidance of staff management or SSA counsel or your own corporate counsel if antitrust questions arise. More detailed information is available upon request. Call 703.575.8000.

Timothy J. Dietz
President & CEO



By joining the Self Storage Association, you become part of the largest community of self storage facility owners, operators, managers and suppliers in the world.

Some of the benefits of the association include:

New Member Operations Package: Upon new membership or renewal, Direct Members now receive three essential operations publications; the Self Storage Employee Policy Manual, the Guide to Drafting Your Rental Agreement and the Self Storage Training & Procedures Manual. These publications are digital files and appear on your member dashboard when you log into selfstorage.org (certain restrictions apply).

Data & Information: SSA data publications include the Self Storage Demand Study, Market Inventory Study and quarterly REIS / SSA self storage data includes survey results from more than 21,000 participants on financial & occupancy characteristics in 125 MSA's and 477 sub-markets. Direct members receive discounts on all studies. These studies are revolutionizing the way owner-operators, and managers, look at this industry and how they market to their residential and commercial customer base.

Self Storage Association Annual Executive Ski Workshop: Join your peers and network during the Annual SSA Executive Ski Workshop. This educational getaway boasts some of the industry's top speakers. Combine that with industry roundtables, networking and some skiing fun, and you can understand why this event is sold out every year. Members receive reduced registration rates.

SSA Spring Conference: Gain a competitive edge by being the first to see the latest products, technology, and services at the SSA Spring Conference and Trade Show. Members can exhibit and attend at discounted rates. This east of the Mississippi event location varies year to year, please check www.selfstorage.org for location and date.

SSA Fall Conference: In addition to the Spring conference, SSA offers the Fall Conference and Trade Show in Las Vegas, Nevada. Once again, SSA brings you the top industry suppliers in this trade show, educational seminars, and remarkable speakers that will have you talking weeks after the conference. This conference, like other SSA events, offers one on one roundtable discussions on industry topics that are important to you, your business and bottom line.

Education & Training Programs: An educated workforce is one of the most important factors in growing your company. SSA provides first-class self storage specific learning opportunities on a variety of topics. SSA Online University also presents live monthly webinars, free to SSA members, plus downloadable training for companies and individuals through SSA Online U's Education to Go and Webcast Recording Library. Additionally, SSA offers the acclaimed SSA Managers Certification Program, an intensive course providing a solid foundation for self storage management, and an opportunity for self storage professionals to attain the prestigious SSA Certified Self Storage Manager (CSSM®) designation.

Publication Discounts: SSA offers numerous sales and marketing tools, data, management materials, resources, safety programs and legal resources at deep discounts to members and conference attendees.

The SSA Magazine: By mail, you will receive the industry's leading magazine, *SSA Magazine*. The Online SSA Magazine is the virtual version of the Self Storage Association's membership magazine. The publication keeps you up to date with the SSA's latest news and activities, providing features about owners, operators and employees that make the industry what it is today.



Self Storage Legal Review Newsletter: The Self Storage Legal Review is the industry's top legal publication and is your best source of timely information on legal developments in the industry. It monitors emerging trends and legal issues that affect not only the industry, but your individual business as well. This is a bi-monthly publication. SSA members receive one subscription to the SSLR with membership in the Self Storage Association. Don't let this opportunity wait any longer! Make sure that you have the information you need to do the best job that you can.

SSA Magazine Weekly: Each Monday you will receive the *SSA Magazine Weekly* in your email inbox. This email contains industry news and information pertinent and relevant in a timely manner.

Industry Advocacy: SSA regularly flies around the country to represent members on self storage issues at the local and state levels. In addition, SSA represents the industry before the U.S. Congress and federal regulatory bodies, as well as in-person representation and testimony from SSA Government Relations Staff.

SSA Legal Resource Center: The SSA Legal Resource Center (LRC) will provide a one-stop library destination for self storage operators to access the legal information necessary to operate their successful storage businesses. The Legal Resource Center makes legal information available to SSA members at no charge. The SSA in-house legal team monitors the LRC.

Enhanced Business Exposure: SSA members have more business exposure. Members are listed in SSA's online facility locator and may use the SSA member logo in marketing and outreach materials. Additionally, SSA produces, online, the Membership Directory which provides a "who's who" in the self storage industry.

Self Storage Legal Network: How much do you spend per year on legal fees? A popular benefit of being a direct SSA member is access to the Self Storage Legal network. This legal hotline service is only available to SSA members and provides one of the best sources available for obtaining industry related legal information. The SSLN attorney's are Carlos Kaslow and Scott Zucker, whose combined experience in the self storage industry exceeds 50 years! The subscription rate for the SSLN begins at \$575 yearly (prices based on facility count). When you or your employee have a legal question concerning self storage operations, you simply login to the SSLN online site and ask your question. THE SSLN is staffed from 8:00 a.m. – 5:00 p.m. M-F and provides a response to your inquiry by the next business day. Lien law questions, rental agreements, or partial payment questions – just ask the attorneys. The SSLN is a legal and operations information service and does not provide subscribers with legal services. For more information on this please contact SSA at (703) 575-8000.

Scholarship Fund: The SSA Foundation Scholarship Program provides scholarship awards of \$1000 to \$5000 toward postsecondary education tuition and fees. This is a need-based scholarship program for students with at least a "C" cumulative average or 2.0 cumulative GPA on a 4.0 point scale. Recipients must be employees (or their children / grand-children) of companies which are direct members of the Self Storage Association (national). Eligibility requirements also include a demonstration of integrity within school and /or workplace and documented pursuit of meaningful education at an accredited postsecondary education institution.

As always, by renewing your membership you instantly receive a \$50 gift certificate which may be redeemed to attend our trade shows, increase your office library by purchasing any of our books which includes the annotated lien laws or use it to partake in a seminar.



CONFERENCE PROCEEDINGS

SPRING CONFERENCE & TRADE SHOW

March 9 – 11, 2022 • Rosen Shingle Creek
Orlando, Florida

Many speakers were considered by the Self Storage Association for our conference program. Selected were those individuals who were thought to be the most capable of presenting their expertise and experience so that you, the self storage professional, would benefit from your conference participation. The experience and knowledge of our speakers is vast. We urge you to take advantage of it!

Each speaker was encouraged to submit a written presentation (frequently referred to as a “handout”) for inclusion in this electronic book. If provided, those handouts are contained herein, and are *arranged by day, in the order that they appear in the program.*

Most of our speakers have agreed to let us audio-record their presentations, along with their PowerPoint presentations. **Registrants in the "Full" or "Additional Rep" categories (who are SSA Direct members) will receive a free download of the approved recorded presentations, about 3 weeks after the event.** Other registrants may purchase downloads. Watch the SSA website (www.selfstorage.org) for information on ordering these recordings.

Should you wish to contact our speakers as a follow-up to their participation in this conference, you will find complete names and addresses on the Attendee List, found on our mobile app, shown alphabetically by company.

Roundtable discussion topics (if scheduled) and pre-conference optional events are *not included* in these Proceedings. A description of the discussions are in your onsite program guide. For additional information on the topics, we suggest you contact the discussion leaders. They are listed in the Attendee List, alphabetically by company, in our mobile app.



WEDNESDAY **PRESENTATIONS**

SELF STORAGE ASSOCIATION 2022 SPRING CONFERENCE & TRADE SHOW

Handouts for speakers whose
presentations are scheduled for
Wednesday follow this page

Orientation for First-time Attendees and New SSA Members

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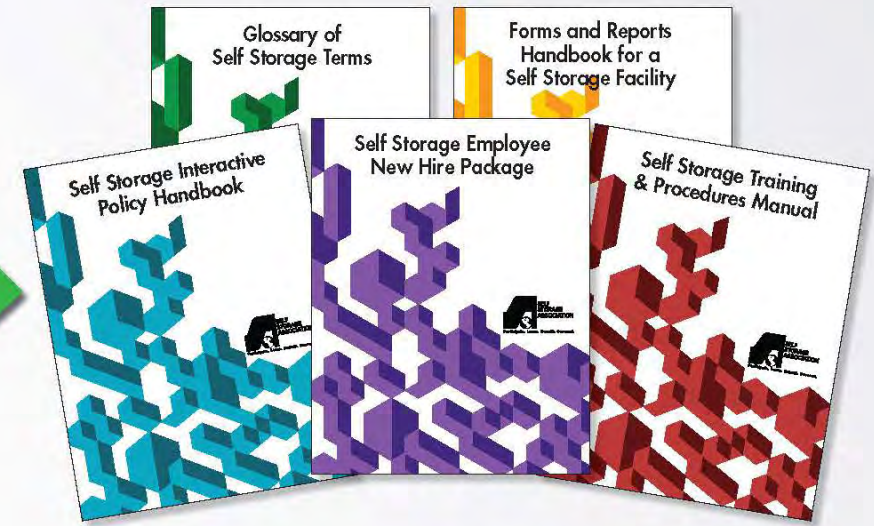
Presentations will be
available after the
conference to
SSA members only.

selfstorage.org

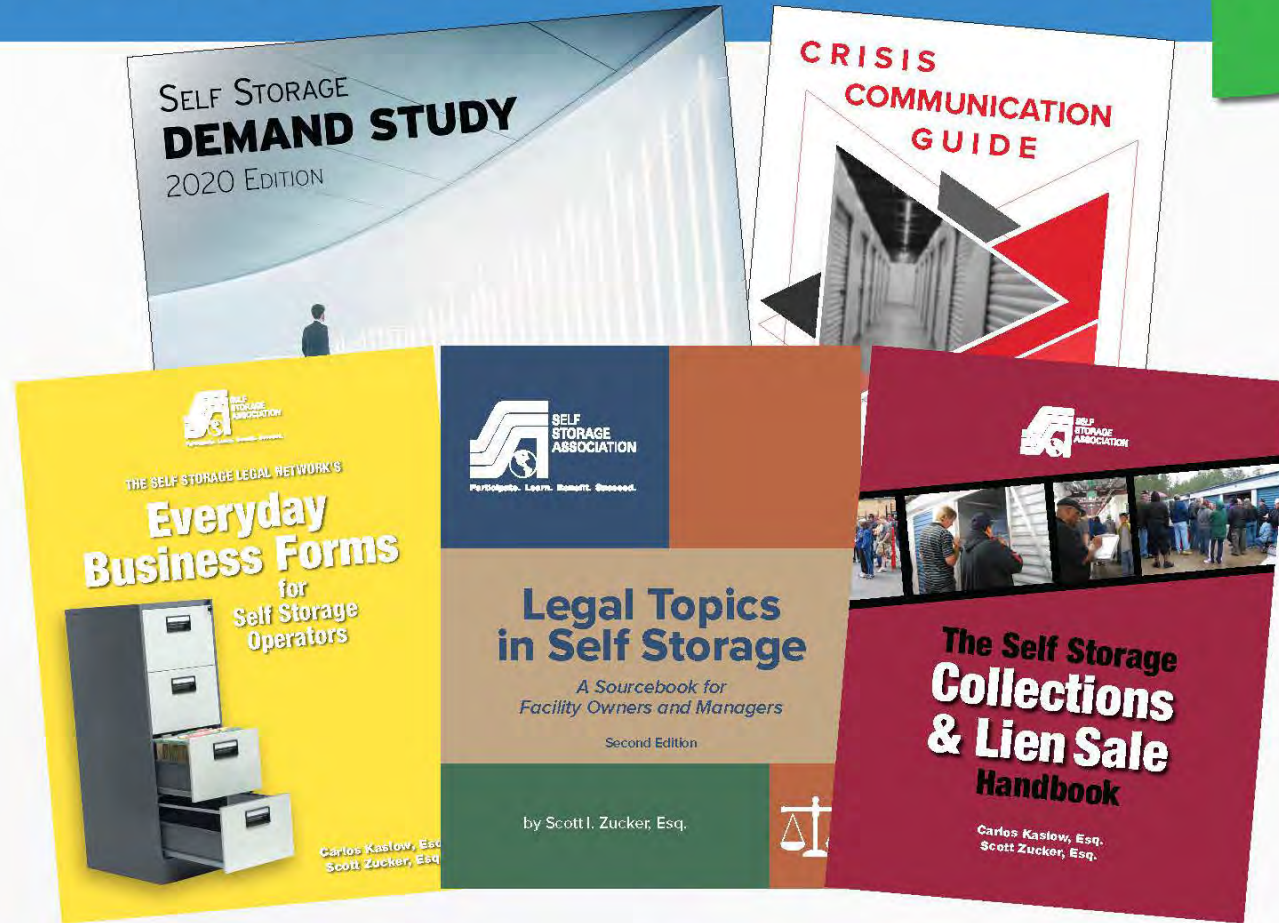
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Visit the SSA membership desk to purchase publications on the topics discussed in this session.
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PUBLICATIONS



We offer lien law booklets for 49 states.



Young Leaders Group (YLG) Educational Session

(Membership in the YLG required)

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THURSDAY **PRESENTATIONS**

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Thursday follow this page

Concurrent Educational Session

Your Tenant's Dead, Can the Cadillac be Sold?

**PRESENTER: Jeffrey Greenberger,
Greenberger & Brewer, LLP**



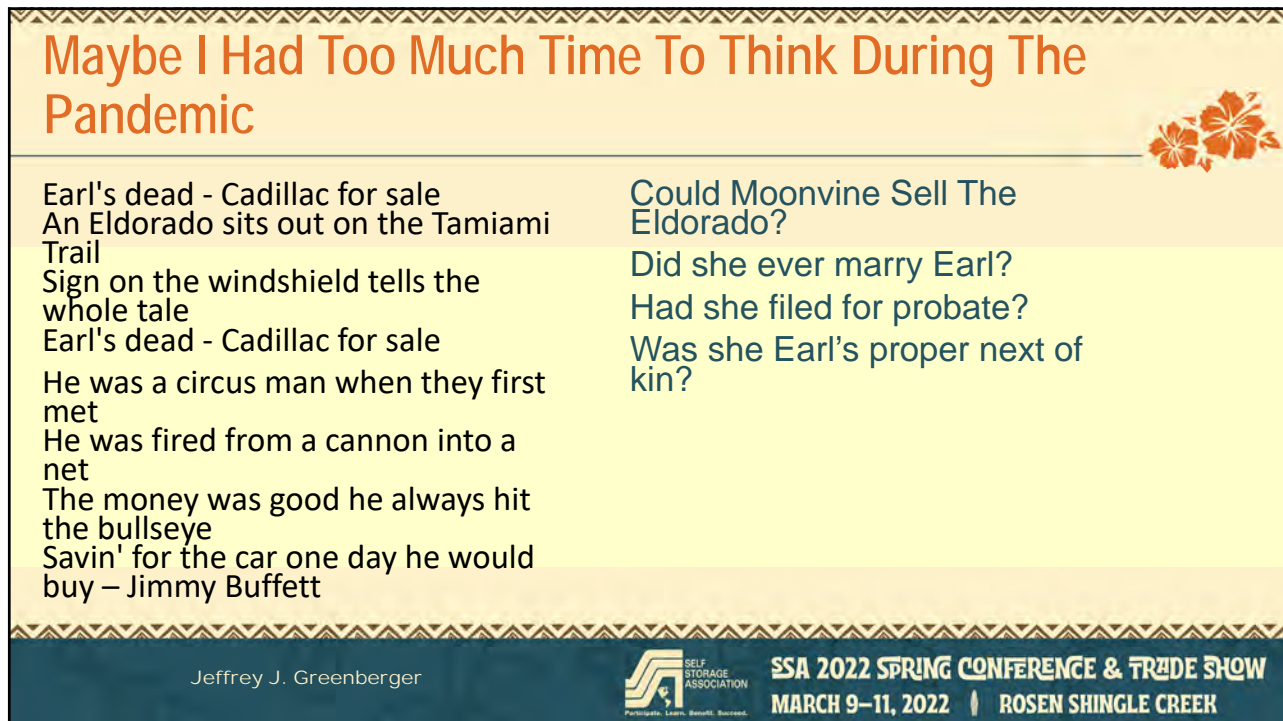
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Your Tenant Is Dead, Can The Cadillac Be Sold?

Jeffrey J. Greenberger
Greenberger & Brewer, LLP
www.SelfStorageLegal.com
www.Late2Lien.com

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1



Maybe I Had Too Much Time To Think During The Pandemic

<p>Earl's dead - Cadillac for sale An Eldorado sits out on the Tamiami Trail Sign on the windshield tells the whole tale Earl's dead - Cadillac for sale He was a circus man when they first met He was fired from a cannon into a net The money was good he always hit the bullseye Savin' for the car one day he would buy – Jimmy Buffett</p>	<p>Could Moonvine Sell The Eldorado? Did she ever marry Earl? Had she filed for probate? Was she Earl's proper next of kin?</p>
--	---

Jeffrey J. Greenberger

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2

Your Tenant Is Dead



How did you find out?

Is this true/how do you confirm?

Who is telling you?

What does this person want from you?

Greenberger & Brewer, LLP



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3

Your Tenant Is Dead



Hardest Issue To Handle

Begin with the proposition you cannot presume service of your default notice(s) on a person who is deceased = you cannot legally sell a dead tenant's property without additional factors in place.

Late2Lien, LLC



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Most Common Mistakes



Dead Tenants

Facility grants access after being presented:

A death certificate;

A Power of Attorney; or

A copy of a Will not yet probated.

Jeffrey J. Greenberger



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5

What Is Probate



Probate is Your Best Option

Probate also refers to the general administering of a deceased person's will or the estate of a deceased person without a will.

This is handled by a probate judge or magistrate generally in a separate division of the court systems known as Probate Court, although some states provide that a “regular” judge hears probate cases on a separate docket or rotates to the probate division for a period of time.

Greenberger & Brewer, LLP



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Purpose Of Probate



The main function of placing an estate into probate is the orderly transfer of assets and the payment of debts of the deceased party.

Sometimes a probate court must determine which conflicting sets of documents are genuine and the last and final wishes of the decedent.

Additionally, sometimes there are challenges to the competency of ability of the decedent to have made changes to the estate documents later in life.

Probate courts sort all of this out.

Late2Lien, LLC



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Executor/Executrix



Executor

One common term in probate is the person who is named to be the representative of the estate, if named in a will, then the person appointed to be the representative is the Executor or Executrix.

The executor's main duty is to carry out the instructions to manage the affairs and wishes of the deceased.

This includes disposition of assets including special bequests and payment of the debts.

Jeffrey J. Greenberger



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Administrator/Administratrix



Administrator

The Administrator/Administratrix performs the same functions but is the title assigned when there is no Will to appoint an Executor, or the Executor is not able or willing to perform the duties assigned by the Probate Court.

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Why Does All Of This Matter



Things Can Go Wrong, Quickly

If the family of the deceased tenant do not want to open a probate estate or the family if any does not even come forward to try to claim the content of the Space, there is risk to the Operator of a wrongful disposal.

Late2Lien, LLC



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10

Not So Great Options



Do Not Use These Options Without Your Attorney Involved

Check the obituary, who are the actual surviving relatives;
Get a release from the relatives entitled to inherit;
Consider a “backstop” clause in your rental agreement to help;
Hold the personal property until the time to claim has passed.

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Thanks For Waking Up With Me



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R.I.P. Earl



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Concurrent Educational Session

Protecting Your Client Data and What to Do in Case of a Breach

PRESENTER: Steve Lucas, The Storage Group

Concurrent Educational Session

Self Storage Valuation: Advanced Dissecting of Institutional Models

PRESENTER: Mike Mele, Cushman & Wakefield

Concurrent Educational Session

Debunking the High Occupancy Goal

**PRESENTER: Carol Mixon, SkilCheck Services,
Inc.**



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Debunking the High Occupancy Goal

Presented by
Carol Mixon Krendl
Owner | SkilCheck Services, Inc.

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1

Highest Occupancies Ever!



- “Making hay while the sun shines!”
- The storage industry is experiencing some of the highest occupancies ever!
- Some properties are experiencing higher delinquencies, too.
- More auctions?
- However, some owners/managers still haven't increased prices since COVID began.
 - Why?!



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2

How Do Your Rates Compare?

- Are you checking your competitors' rental rates regularly?
- Are you increasing rents yearly or more often?
 - 6-month or 1 year guarantee?
 - What are the pros and cons of guarantees?

Price is what you pay.
Value is what you get.

Warren Buffett

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3

Management Summary Report

- Learn to read the management reports!
- Most managers and even owners don't understand what all the numbers mean on the Management Summary Report.



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4

Phoenix Rental Market Summary

RENTAL MARKET SUMMARY

Market: Phoenix
City: Scottsdale
Group By: Unit Type
Rent Period: Jan, 2022

Unit Type	Rental Rate Per Unit		
	Low	High	Average
5x5	\$15	\$103	\$58
5x5 (Climate)	\$30	\$145	\$64
5x10	\$41	\$184	\$101
5x10 (Climate)	\$44	\$189	\$115
5x15	\$54	\$208	\$120
5x15 (Climate)	\$109	\$215	\$161
10x10	\$85	\$319	\$182
10x10 (Parking)	\$187	\$219	\$201
10x10 (Climate)	\$94	\$330	\$204



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Phoenix Rental Market Summary

	Low	High	Avg			
10x10	\$85	\$319	\$182	\$0.85	\$3.19	\$1.82
10x10 (Parking)	\$187	\$219	\$201	\$1.87	\$2.19	\$2.01
10x10 (Climate)	\$94	\$330	\$204	\$0.94	\$3.30	\$2.04
10x20	\$170	\$522	\$323	\$0.85	\$2.61	\$1.61
10x20 (Parking)	\$52	\$352	\$146	\$0.26	\$1.76	\$0.73
10x20 (Climate)	\$132	\$543	\$354	\$0.66	\$2.72	\$1.77
10x20 (Parking - Climate)	\$312	\$312	\$312	\$1.56	\$1.56	\$1.56
10x30	\$164	\$655	\$434	\$0.55	\$2.18	\$1.45
10x30 (Parking)	\$311	\$311	\$311	\$1.04	\$1.04	\$1.04
10x30 (Climate)	\$271	\$1,354	\$550	\$0.90	\$4.51	\$1.83
10x30 (Parking - Climate)	\$467	\$467	\$467	\$1.56	\$1.56	\$1.56
	Overall Low	Overall High	Overall Average	Overall Low	Overall High	Overall Average
	\$15	\$1,354	\$195	\$0.26	\$5.78	\$1.79



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Management Summary | Health of Property

Gross Potential Rates ¹	65,140	100.0%	1.09
Gross Unrentable Unit Rates	2,235	3.4%	1.06
Gross Vacant Unit Rates	3,325	5.1%	1.28
Gross Occupied Unit Rates	59,580	91.5%	1.08
Gross Complimentary Unit Rates	1,740	2.7%	0.99
Actual Occupied Unit Rates ²	53,626	82.3%	0.97
Occupied Rate Variance	5,954	9.1%	0.08
Effective Rate after Concessions ³	52,808	81.1%	0.96
Unpaid Charges (Current tenants)			
Days	Amount	Units	%Units %GrossPot %Actual
0-10	7,442.70	32	7.9 11.4 13.9
11-30	8,012.40	32	7.9 12.3 14.9
31-60	5,232.10	13	3.2 8.0 9.8
61-90	3,800.00	6	1.5 5.8 7.1
91-120	2,925.00	9	2.2 4.5 5.5
121-180	2,686.00	8	2.0 4.1 5.0
181-360	1,196.39	4	1.0 1.8 2.2
>360	0.00	0	0.0 0.0 0.0
Total	31,294.59	104	25.5 48.0 58.3

Economic Occupancy is based on dollars - not rentals.

- 91.5% Gross occupied spaces
- 81.1% Effective Rate or Economic Occupancy.
- What causes a difference between these two percentages?



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What Causes Differences?

As of Tuesday, September 17, 2019				
Occupancy	Units	%Units	Area	%Area
Occupied	407	89.3%	55,025	82.1%
Vacant*	33	7.2%	2,600	4.4%
Unrentable	16	3.5%	2,100	3.5%
Complimentary	10		1,750	
Total	456	100.0%	59,725	100.0%
Waiting List	2	Autobilled**	53	
Overlooked**	68	Insurance**	0	
Per Area				
Gross Potential Rates ¹	65,140	100.0%	1.09	
Gross Unrentable Unit Rates	2,235	3.4%	1.06	
Gross Vacant Unit Rates	3,325	5.1%	1.28	
Gross Occupied Unit Rates	59,580	91.5%	1.08	
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61-90	3,800.00	6	1.5 5.8 7.1	
91-120	2,925.00	9	2.2 4.5 5.5	
121-180	2,686.00	8	2.0 4.1 5.0	
181-360	1,196.39	4	1.0 1.8 2.2	
>360	0.00	0	0.0 0.0 0.0	
Total	31,294.59	104	25.5 48.0 58.3	

1. Delinquencies and spaces up for auction.
2. Discounts/ Concessions
3. Complimentary Units
4. Employee Theft

Discounts (Variances from standard rates.)			
Rent (Expiring)	0.00	478.40	3,950.99
Rent (Non-Expiring)	42.00	3,791.50	33,646.64

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What Makes Your Property Worth More to Customers?

- **For some customers, managers at the property!**
- **CLEAN**
- Monitoring what is happening on the property.
- Better customer service than unmanned properties.



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Value Pricing

Choose Your Space

Reserve or Rent Now to lock this rate and discount today.

PREMIUM	STANDARD	VALUE
\$199/mo. \$221/mo. In-Store	\$188/mo. \$209/mo. In-Store	\$180/mo. \$200/mo. In-Store
Premium - 170 ft. from Entrance	Standard - 190 ft. from Entrance	Value - 255 ft. from Entrance
10' x 7.5' Climate Controlled Self Storage Unit**	10' x 7.5' Climate Controlled Self Storage Unit**	10' x 7.5' Climate Controlled Self Storage Unit**

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10

Storage Spaces Have Different Values

- **Location** of space makes it more valuable to some customers.
 - Ground floor
 - Drive up
 - Close to the elevator
- Amenities
 - Climate controlled
 - Door alarms
 - Nokie locking system



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11

Think About Your Pricing Strategies!

- There are pros and cons for different types of storage.
- Don't assume value based on your opinion.



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12

Waiting Lists?

- Are you working a waiting list?
- Asking good questions on the phone or in person
 - When will you be needing the space?
 - Give me a good idea of what you will be storing so I can reserve you the correct size.
 - Ask customer to give you advance notice of move-out.



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It's All About Income!

- Be careful not to worry about occupancy.
- High occupancy can be deceiving as to the success of the property.



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Management Summary

Occupancy	Units	%Units	Area	%Area
Occupied	852	93.3%	85,025	94.3%
Vacant*	61	6.7%	5,150	5.7%
Unrentable	0	0.0%	0	0.0%
Complimentary	12		1,706	
Total	913	100.0%	90,175	100.0%
Waiting List	3	Autobilled**	466	
Overlooked**	3	Insurance**	729	
			Per Area	
Gross Potential Rates ¹	232,259	100.0%	2.58	
Gross Unrentable Unit Rates	0	0.0%	0.00	
Gross Vacant Unit Rates	11,985	5.2%	2.33	
Gross Occupied Unit Rates	220,274	94.8%	2.59	
Gross Complimentary Unit Rates	4,115	1.8%	2.41	
Actual Occupied Unit Rates ²	178,624	76.9%	2.10	
Occupied Rate Variance	41,651	17.9%	0.44	
Effective Rate after Concessions ³	177,012	76.2%	2.08	

Unpaid Charges (Current tenants)

Days	Amount	Units	%Units	%GrossPot	%Actual
0-10	416.36	1	0.1	0.2	0.2
11-30	3,346.06	11	1.3	1.4	1.9
31-60	1,224.03	5	0.6	0.5	0.7
61-90	0.00	0	0.0	0.0	0.0
91-120	0.00	0	0.0	0.0	0.0
121-180	0.00	0	0.0	0.0	0.0
181-360	0.00	0	0.0	0.0	0.0
>360	0.00	0	0.0	0.0	0.0
Total	4,986.45	17	2.0	2.1	2.8

Collections (Receipts collected towards rent and late fees.)

Prepaid Rent	3,136.00	15,567.55
Current Rent	4.84	162,775.93
Past Due Rent	0.00	3,394.87
Total	3,140.84	181,738.35
Current Late Fee	0.00	912.40
Past Due Late Fee	0.00	881.04
Total	0.00	1,793.44

NSF Reversals

	0	0	0
	0.00	0.00	0.00

Concessions (Credits Issued)

Rent	0.00	968.58	19,164.38
Rent (Bad Debt)	0.00	3,844.84	4,274.19
Late Fees	0.00	795.20	3,211.18
Taxes	0.00	1.37	6.29
Other	0.00	1,364.57	2,221.93
Total	0.00	6,974.56	28,877.97

Discounts (Variances from standard rates.)

Rent (Expiring)	0.00	643.30	14,335.88
Rent (Non-Expiring)	0.00	43,331.43	375,627.63

Bad Debts

	0.00	1,383.62	1,383.62
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Management Summary

- If you manage a self storage property by the numbers, what would you do to fix problems in the revenue stream?



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Debunking the High Occupancy Goal



Carol Mixon

Owner | SkilCheck Services, Inc.

800.374.7545

Carol@SkilCheck.com



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OPENING PANEL SESSION

**Rent Growth is
Decelerating and
Inflation is Rising. What
now?**



The banner features a yellow background with a decorative brown border at the top and bottom. On the left, the SSA logo is displayed with the text 'SELF STORAGE ASSOCIATION' and the tagline 'Participate. Learn. Benefit. Succeed.' Below this, the title 'SSA 2022 SPRING Conference & Trade Show' is written in large, bold, orange and brown letters. To the right of the title is a large, stylized palm tree. The main headline, 'Rent growth is decelerating and inflation is rising. What now?', is written in a large, dark blue font. Below the headline, the names and titles of three speakers are listed: Jeff Adler, Self Storage Industry Principal, Yardi Systems; Burke Bradshaw, Chief Operating Officer, Towne Storage; and Jeff Mense, Broker, Keystone Commercial Realty. At the bottom, a dark blue banner contains the text 'Yardi Breeze' on the left, 'MARCH 9–11, 2022' in the center, and 'ROSEN SHINGLE CREEK' on the right.

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Rent growth is decelerating and inflation is rising. What now?

Jeff Adler, Self Storage Industry Principal, Yardi Systems
Burke Bradshaw, Chief Operating Officer, Towne Storage
Jeff Mense, Broker, Keystone Commercial Realty

Yardi Breeze

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Common storage expenses



- Property taxes
- Insurance
- Labor costs
- Procurement
- Payment processing

Yardi Breeze



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Improve back office efficiencies



Problem:

Your staff are spending hours every week filing paperwork, printing and cutting checks and processing paper invoices

Solution:

- Adopt paperless invoicing, procurement and vendor payments

Yardi Breeze



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Better manage credit card processing fees



Problem:

Your credit card fees are adding up to thousands of dollars every month

Solution:

- Take time to analyze how much you are really paying in fees
- Allocate fees as a fixed cost to tenants instead of absorbing them

Yardi Breeze



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Empower staff with modern tech



Problem:

The labor market is tight and you need to keep lean teams happy and equipped with the right tools

Solution:

- Explore facility management software options that allow for flexible/remote work and real-time data
- Establish a recognition program to motivate staff

Yardi Breeze



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KEYNOTE SPEAKER



Liz Raun Schlesinger
CEO, Merit Hill Capital

Concurrent Educational Session

Diversity & Inclusion is Good for Business and Morale

**PRESENTERS: Jonathan McGee, IL Dept. of Economic
Development
Howard Pryor, SpareSpace Storage
Nathan Bennett, UTEX Storage**

Concurrent Educational Session

**Recruiting, Onboarding and
Training in a Virtual
Environment**

**PRESENTER: Amber Tyson, Absolute Storage
Management**

Concurrent Educational Session

Reshaping Your Business and CX with Voice Innovations

**PRESENTERS: Alissa Stoeckel and Scott Worden,
CallPotential**



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Reshaping Your Business and CX with Voice Innovations

Scott Worden - Business Development Manager, CallPotential
Alissa Stoeckel - Marketing Coordinator, CallPotential

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1

Hey Alexa, is voice dying?





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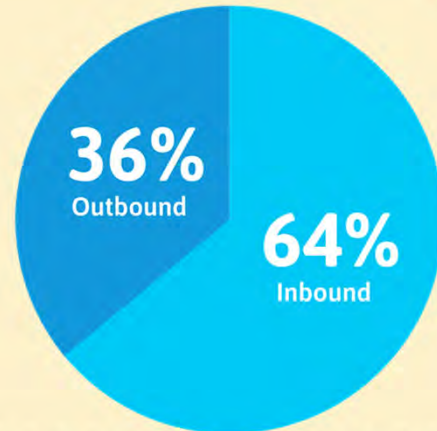
2

Heck no!

In fact, even our own self-storage data tells us otherwise.

Out of 19 million calls processed through CallPotential in 2021, 64% were inbound.

A 27% YoY increase from 2020!



CallPotential



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3

Why is it so important?

**Voice = Data
 &
 Data = Better Experiences**

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What we'll cover:



- The benefits of voice technology
- How it can work as a lead rescue tool
- How it can work with your existing customer data
- Why voice combats staffing challenges
- PCI compliance
- and some takeaways

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5

In the past...



The customer experience came 2nd.

- Calls were forwarded
- Little to no customer visibility
- No call queues
- No online rentals (gasp!)
- Busy signal, little to no phone options

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Moving forward...

Voice Technology



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Voice offers Accessibility

IVR vs. SmartRoute

- Customer, prospect, calling to pay a bill

Hold vs. Call Back

- Call-back options



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Voice offers Work-from-Anywhere Flexibility



- Are you growing your portfolio?
- Are you running a hub-n-spoke model and/or unattended sites?
- Are you prepared for unexpected business disruptions?
- Are you having staffing challenges?

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11

Voice offers Scalability



- Let your technology grow with you
- Use a blend of automation to match your needs
 - Live virtual agents/managers, kiosks

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Voice offers Valuable Data



- PCI-compliant & reliable customer data

How?

Conversation Intelligence

What is CI?

A fancy way to process a large number of customer interactions and give them structure.

- Lead rescue tool



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Takeaways



1. Do a call audit.
1. Find a solution that fits *your* needs.
1. Voice is the future and it's here to stay.

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Contact Us or Connect with Us on LinkedIn



Scott Worden

Business Development Manager, CallPotential

scott@callpotential.com



Alissa Stoeckel

Marketing Coordinator, CallPotential

alissa@callpotential.com

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Concurrent Educational Session

Crossing the Finish Line with New Construction

**PRESENTER: Todd Rudnianyn, Neighborhood
Storage**



Crossing the Finish Line with New Construction

Todd Rudnianyn

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About Me

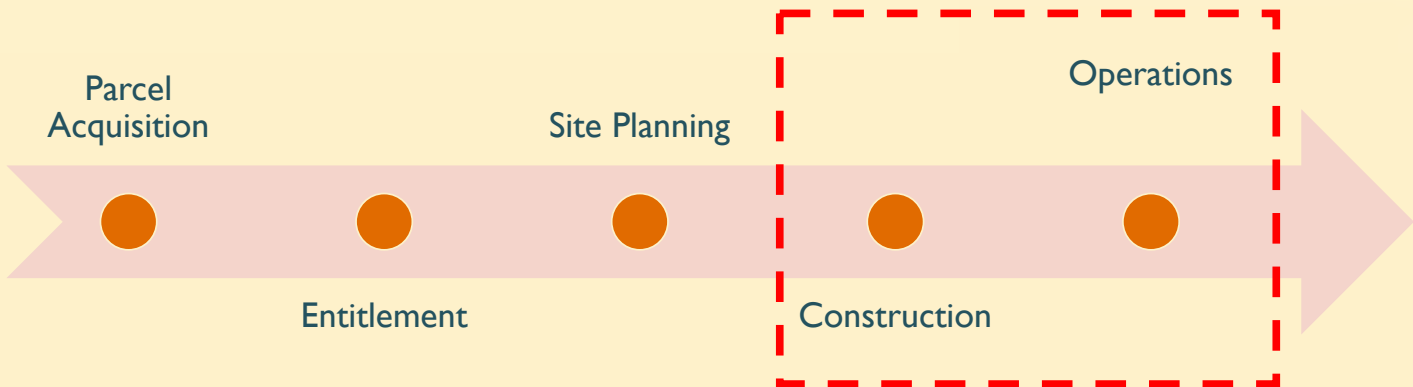


President of Neighborhood Storage Center Co.

- 15+ years industry experience
- 27 properties in North Central Florida
- Approximately 100,000 square feet of development per year
- BA/BS University of Pennsylvania, MBA Harvard University, Executive Master of Urban Planning University of Southern California

Presentation is intended for educational purposes only and does not replace professional judgment. Statements of fact and opinions expressed are of the presenter individually. Presenter assumes no responsibility for content, accuracy, or completeness of information presented.

Acquisition to Operations



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Local Jurisdictions



Get to Know Staff!

- It's harder for people to say no to your face.



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Be a Good Neighbor



Communicate with Neighboring Communities and Businesses BEFORE, DURING, and AFTER Construction Commencement.

- Seek Feedback
- Offer Pre-Opening Tours
- Neighborhood Discounts

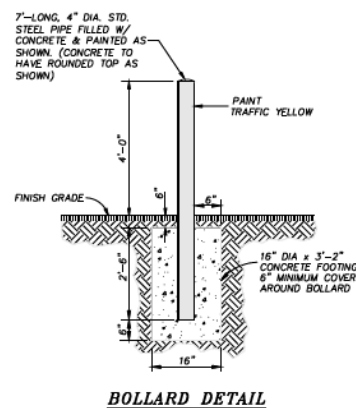


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Engineering and Architecture



Hire Experience
Details, Details, Details



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Contractor Addendum



- All required items should be accounted for in AIA addendum
 - Contractor provided with punch list that matches required items in addendum
 - Require timely updates and modifications to construction timeline
 - Everyone agrees to expectations **at the very beginning!**

The Contractor shall provide the Owner with a written update of the Construction Schedule every 1st and 3rd Monday of each month. Such update shall fully describe any delays, reasons for such delay, and an updated completion date if the completion date has changed since last communicated. Failure to provide an update shall result in a one hundred dollars (\$100.00) reduction in contract price per occurrence.



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Unit Checklist for New Construction: Punch List Items



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Why Inspect?



Inspecting construction sites prior to operation is key in maintaining the standard the community has come to expect from Neighborhood Storage. We take pride in our facilities and the overall brand Neighborhood Storage has come to be. By inspecting construction sites prior to transitioning to operations, we can better ensure the continuity of our standards, facility safety, and mitigate problems before our customers occupy spaces. We have compiled this list of items to inspect, so that any issues can be addressed as soon as possible. This list is checked by our contractor and by two Neighborhood Storage personnel prior to tenant occupancy.



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Door Tension



Doors should be tight enough that they are easy to open, but loose enough that they will not open by themselves. A good rule of thumb is that if a door is opened halfway, it will stay in that position.

If a door is heavy to lift, it should be tightened. If it goes up on its own, then it should be loosened.



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Top of Door Screws



The top of the door should be screwed in with two screws on each side. These two screws do not have to be in the pre-drilled holes but must securely fasten the top of the door to the building.



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Door Track Screws



All pre-drilled holes in tracks should have a screw attaching the track to the column of the building.



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Door Seals



Door seals need to cover the entire bottom of the roll-up door and be securely attached.



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Latches



Check latch to make sure the unit can be locked, and latch will accept the type of lock that is used at the facility (disc or cylinder).

Latch should be fully exposed from behind the column for easy change out in the future.

Test each cylinder lock latch to make sure lock inserts properly.

This latch is too far in the column. Both bolts and the latch should be exposed.

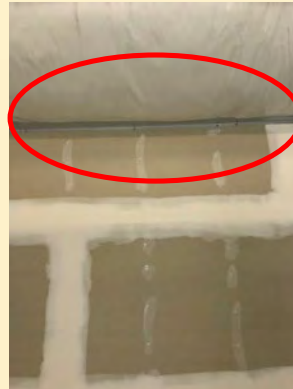


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Insulation

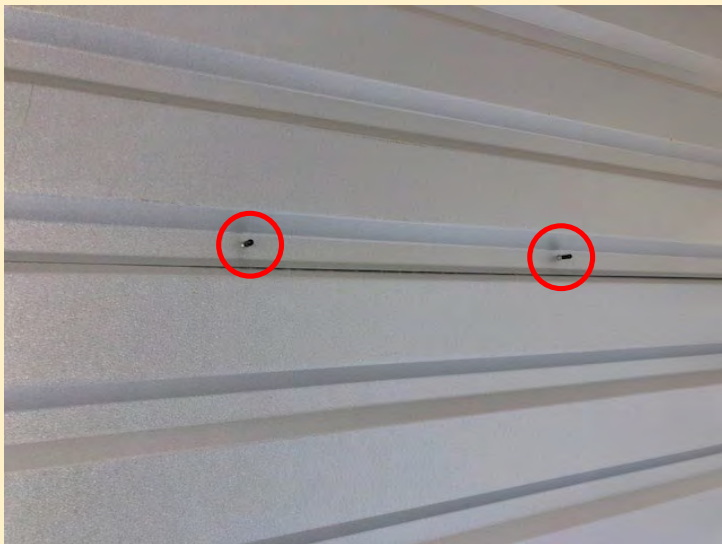


Insulation should be tightly installed to the ceiling. There should be no loose hanging pieces and all holes that were created during install must be taped with insulation tape. Insulation should not be excessively bulging, falling, or not properly attached to the ceiling.



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Interior of Unit



All exposed screw tips in the building must have plastic cover over them.

While checking the interior of the unit look for any other issues, which may include:

- Steps that need to be painted
- Exposed metal that should be covered
- Areas that will require excessive cleaning



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Screws need caps



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Yellow Paint



Entrances to Temperature controlled areas including any HVAC equipment or piping that protrudes, should be painted yellow.

Any step downs concrete more than 3" should be painted yellow.

Any slopes in asphalt that could potentially pose a trip hazard, should be painted yellow.



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Torn Metal



Areas with torn metal or damage are not in accordance with NSC expectations or standards.

New construction needs to be held at a high standard not only for aesthetic purposes but also for customer safety.



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Gap between units



Gaps between units are a potential safety and security issue.

Walls should be secured without any gaps.



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Remove Bolts from Floor



Bolts should be cut if they are sticking through the concrete slab or anywhere else. Exposed bolts are a tripping hazard and safety issue.



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Needs to be covered with corner plate

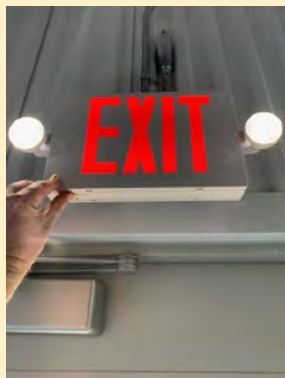


To keep up with NSC standards, all exposed corners should be covered with a corner plate.



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Exit Signs and Fire Extinguishers



Exit signs and extinguishers should be checked.

Extinguishers should have a current date on them and exit signs should be checked to make sure they are working properly.



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Unit Numbers

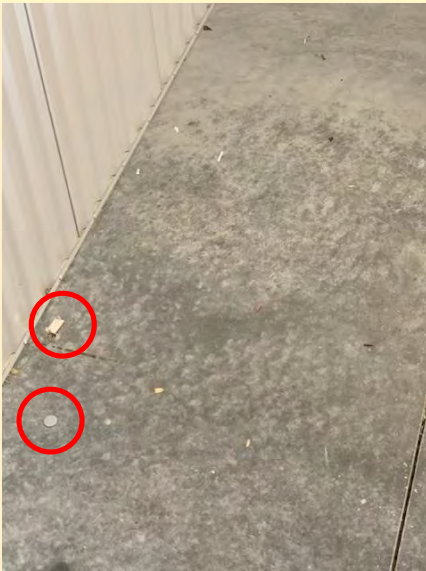


Unit numbers should be securely attached, in the right order, and all accounted for. Each unit should have a unit number securely attached, centered above the door.



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Floors and other areas clean/free of construction debris



Any construction material should be cleaned up once construction is complete. The floors should be cleared and swept clean.



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Check Molding, Trim, and Drywall for Damage



Once construction is complete, molding, trim, and drywall should be checked for any outstanding damage. Walls should be touched up with paint wherever needed, and molding/trim should be clean and free of damage.



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Interior Locks



Temperature Control locks should not be able to lock from the inside. This is so that customers are not locked out of the self-storage building. All temperature control entry doors should have a lock that can only be locked by a key from the exterior, so that doors can be locked by staff only.



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Check Exterior Lighting



Exterior lighting needs to be checked and timers (if any) also need to be checked to make sure they are working properly and are on the correct schedule.



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HVAC Units/Drip Pans



All AC units should have a drip pan under them with the water alarm inside the pan, set to a reasonable height. All HVAC units should also have a filter with a date on them.



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Bollards and Concrete



As a condition precedent to substantial completion, the Contractor shall install 4" diameter steel bollards at a 4' height with bollard covers at the corners of buildings. Said bollard covers shall be yellow with a green stripe at the top. Owner will have locations of said bollards on the approved site plan.

As a condition precedent to substantial completion, the Contractor shall ensure that asphalt is compressed tightly and meets the building with at least 1", but no greater than 2" without owner approval, lip below the exterior concrete floor.



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Rent Ready Units



As a condition precedent to substantial completion, the Contractor shall be responsible for making the facility “Rent-Ready”. “Rent-Ready” shall mean that all walls, floors, and doors in the facility are free from dirt, dust, and debris, and that concrete floors are mopped three times with clean water.



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Internal and Employee Communication



3 Months Out

Site Map and Unit Layout
Fire Extinguishers
Order Software

1 Month Out

Receive Contractor Punchlist
Internal Punchlist
Site Setup in Software

1 Week Out

Make Units “Rent Ready”
Final Walkthrough

2 Months Out

Unit Numbers to Contractor
Website
Office Furniture

2 Weeks Out

Branded Site Signage
Review Punchlist
Maintenance and Office Supplies

Certificate of Occupancy



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Internal and Employee Communication



NSC 26 Lease Up Bonus - Get to 85%!!!

	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Total Bonus	\$ 30,000	\$ 28,000	\$ 26,000	\$ 24,000	\$ 22,000	\$ 20,000	\$ 18,000	\$ 16,000	\$ 14,000	\$ 12,000	\$ 10,000
	\$ 100.00	\$ 93.33	\$ 86.67	\$ 80.00	\$ 73.33	\$ 66.67	\$ 60.00	\$ 53.33	\$ 46.67	\$ 40.00	\$ 33.33
10 rentals	\$ 1,000.00	\$ 933.33	\$ 866.67	\$ 800.00	\$ 733.33	\$ 666.67	\$ 600.00	\$ 533.33	\$ 466.67	\$ 400.00	\$ 333.33
20 rentals	\$ 2,000.00	\$ 1,866.67	\$ 1,733.33	\$ 1,600.00	\$ 1,466.67	\$ 1,333.33	\$ 1,200.00	\$ 1,066.67	\$ 933.33	\$ 800.00	\$ 666.67
30 rentals	\$ 3,000.00	\$ 2,800.00	\$ 2,600.00	\$ 2,400.00	\$ 2,200.00	\$ 2,000.00	\$ 1,800.00	\$ 1,600.00	\$ 1,400.00	\$ 1,200.00	\$ 1,000.00
40 rentals	\$ 4,000.00	\$ 3,733.33	\$ 3,466.67	\$ 3,200.00	\$ 2,933.33	\$ 2,666.67	\$ 2,400.00	\$ 2,133.33	\$ 1,866.67	\$ 1,600.00	\$ 1,333.33
50 rentals	\$ 5,000.00	\$ 4,666.67	\$ 4,333.33	\$ 4,000.00	\$ 3,666.67	\$ 3,333.33	\$ 3,000.00	\$ 2,666.67	\$ 2,333.33	\$ 2,000.00	\$ 1,666.67

*Estimated Bonus Payout based on estimated 300 total rentals to reach stabilization

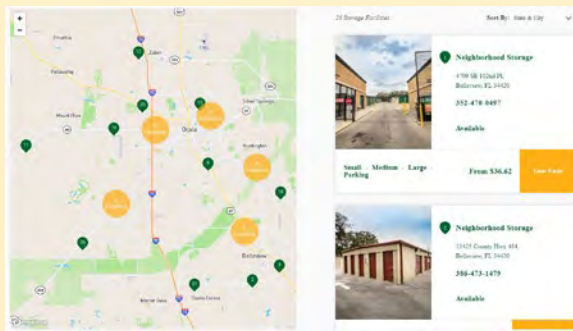


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Oh yeah...Customers



Website



Waitlist

Customer Name	Customer Phone #	Est. Size needed	Date Needed	Existing Unit #	What size or unit #	Email or notes	Site Details - Ocklawaha (Lake Weir)	Est. Opening Quarter
							6X10 10X10 10X15 10X20 12X20 10X25 12X25 10X30 12X30 15X40 Temp 6X5 5X10 10X5 10X10 10X15 10X20 Covered/Uncovered Parking 12X30 12X40 12X50 Rates available closer to completion. Can quote current NSC 5/16 rates for reference	Q4 2021/Q1 2022



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Concurrent Educational Session

Financing Your Self Storage Business in 2022

**PRESENTER: Gregory Porter,
Summit Real Estate Advisors, Inc.**

Concurrent Educational Session

**Go All In: Digital Marketing
Strategies to Bet on When
the Storage Bubble Bursts**

PRESENTER: Lisa Ash and Amird Caballero, G5



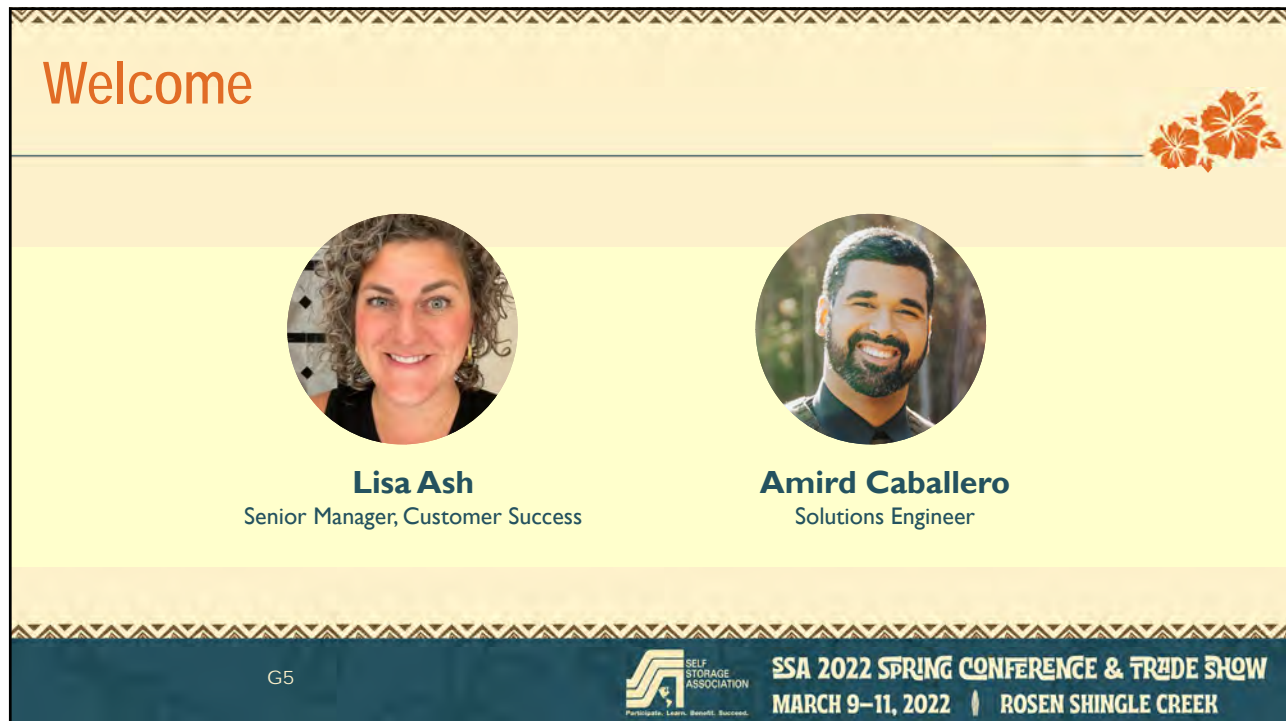
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Go All In: Digital Marketing Strategies to Bet On When the Storage Bubble Bursts


Presented by:
Lisa Ash, Senior Manager, Customer Success, G5
Amird Caballero, Solutions Engineer, G5


G5 **MARCH 9–11, 2022 | ROSEN SHINGLE CREEK**


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Welcome


Lisa Ash
Senior Manager, Customer Success


Amird Caballero
Solutions Engineer

G5  **SSA 2022 SPRING CONFERENCE & TRADE SHOW**
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2

What We Promise You'll Learn

- How **self storage shopper behavior** has changed
- The most **influential digital marketing channels** that lead to conversions
- How data science and analytics can **create efficiency in your marketing spend**
- Why **multi-touch attribution (MTA)** is the most effective way to measure your marketing performance

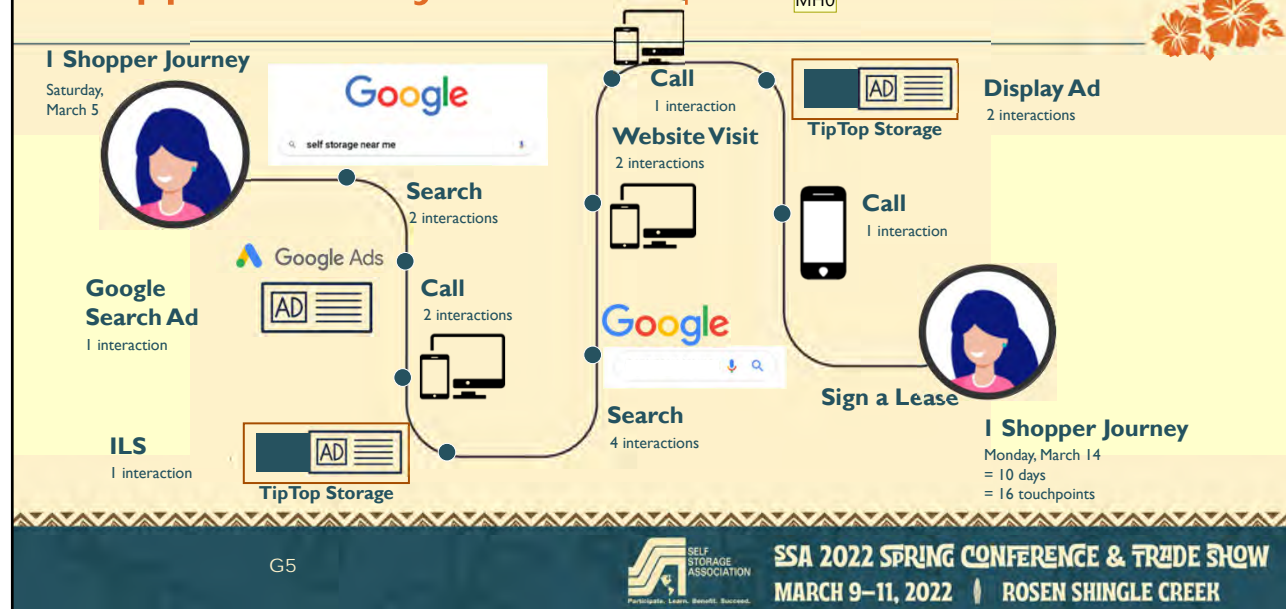
G5



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3

Shopper Journeys Are Complex



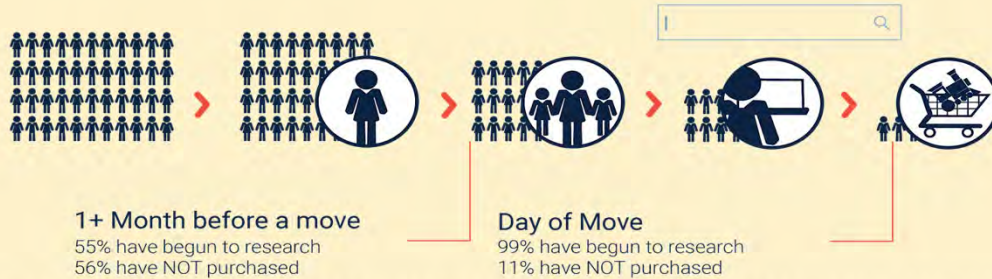
4

Self Storage has a Short Buying Cycle

MH0



Digital advertising can help target short buying cycles
when you need to be in the right place at the right time



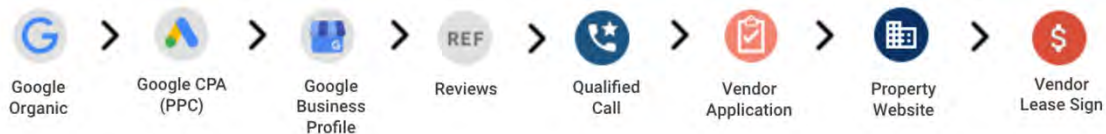
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5

Keep LA0 Messaging Consistent Across All Touchpoints



297 Million
Buyer Journeys
are observed daily
by our CDP

Renters spend
~2 weeks researching
before they contact you

Renters engage
16 touchpoints
on average before
contacting you

G5



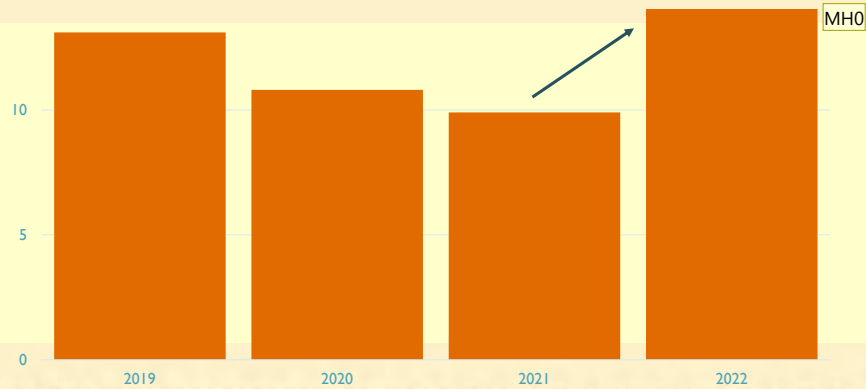
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6

Renters are Taking *More Time* to Research

MH1

Days from 1st touch to inquiry **increased by 35.7%** (Jan YOY 2021 vs. Jan 2022)



MH0

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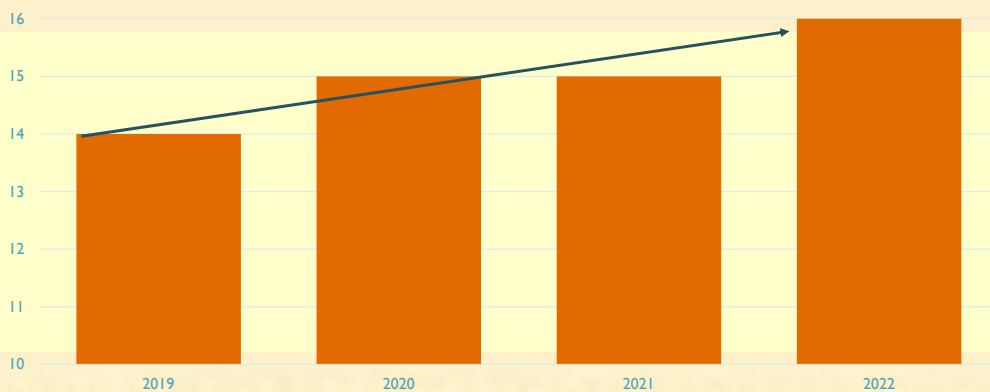


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Renters' Research Increases

Number of touches **increased by 13%** from Jan 2019 to Jan 2022.



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8



9



10

MH0

Google Business Profile (GBP)

MH1

Across 200 SS clients
(2,500 locations)

155,079 LA2
Website Clicks per month

76,248
Calls per month

Stunning photos

Great star rating

SEO Description

Hours (Open 24 hours)

Accurate Phone #

Units



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Google Ads = Turnkey Option to Deliver Renters

Stay top of mind
when shoppers
are searching...



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12

MTA Reveals Shopper Journeys

So you can inform...

...then automate
your marketing
strategy



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13

Deliver the Most Qualified Calls

18.2%

**Qualified Calls
from Digital
Advertising**
Self Storage
2021

Measure Quality by analyzing 'intent to rent'



Captures the
caller's side of the
conversation



Machine Learning
analyzes calls based
on "intent to move-in"



Automatically distributes
Ad spend to find more
qualified calls everyday

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So...What Have We Learned?



- **Self storage shopper behavior** is **faster** and includes **more touchpoints**
- The most **influential digital marketing channels** that lead to conversions are **GBP, Organic Search, and Google Ads**
- Data science and analytics **create efficiency in your marketing spend by giving you the technology & insights you need to get more qualified calls**
- **Multi-touch attribution (MTA)** is the most effective way to measure your marketing performance because you're able to **identify the marketing sources that generated the most influence in leading to a conversion...i.e. you're finding the best converting renters**

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Thank you & Questions



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Contact the Presenters



Lisa Ash

Senior Manager, Customer Success

Lisa.ash@getg5.com



Amird Caballero

Solutions Engineer

Amird.caballero@getg5.com

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Concurrent Educational Session

Is Running an Unmanned Facility Right for You?

**PRESENTERS: Eppie Vojt, Storable
Brad Minsley, 10 Federal**



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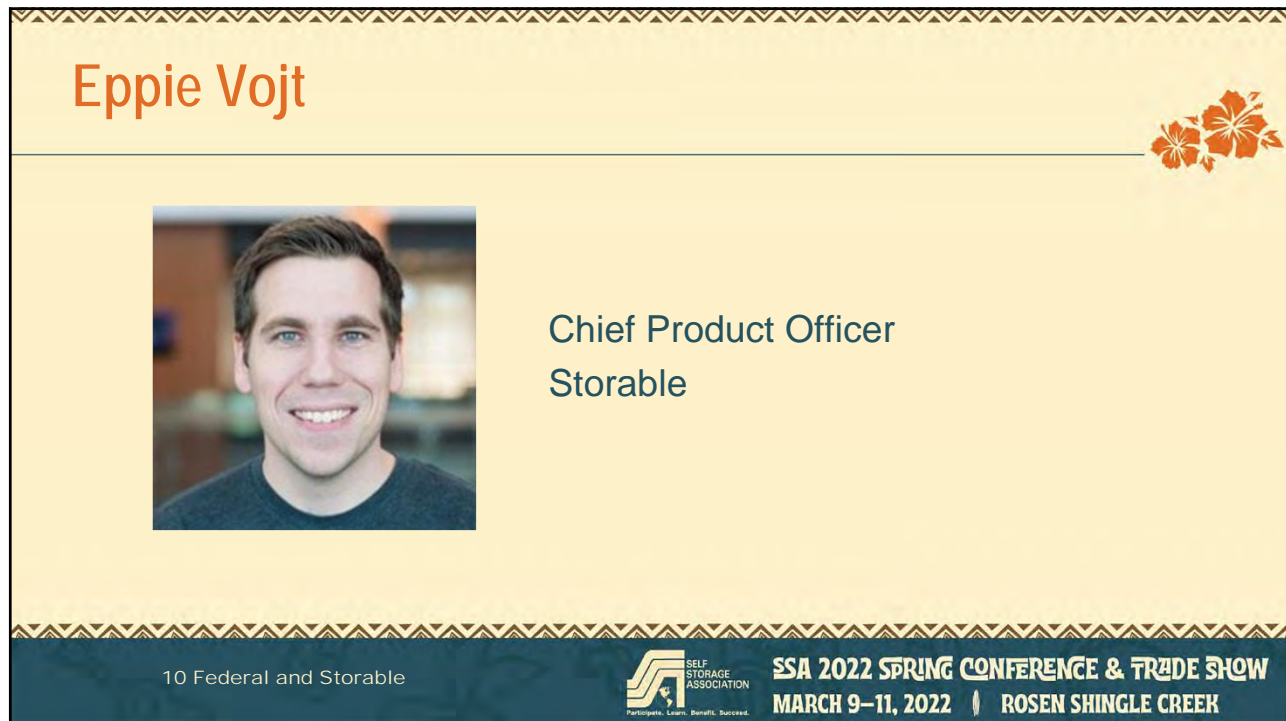
*Is running an unmanned
facility right for you?*

Brad Minsley, 10 Federal
Eppie Vojt, Storable


10 Federal & Storable

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1



Eppie Vojt



Chief Product Officer
Storable

10 Federal and Storable

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Brad Minsley



Founder and CEO
10 Federal

10 Federal & Storable



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Agenda

- The digital expectation
- Defining what “unmanned” means
- Why 10 Federal went unmanned
- Why it’s worked
- Things to consider
- Lessons learned
- Actions you can take

10 Federal & Storable



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4

Digital Expectation: Wider Hours of Operation



31.75%

Of reservations on SpareFoot Occur Outside of Facility Operating Hours

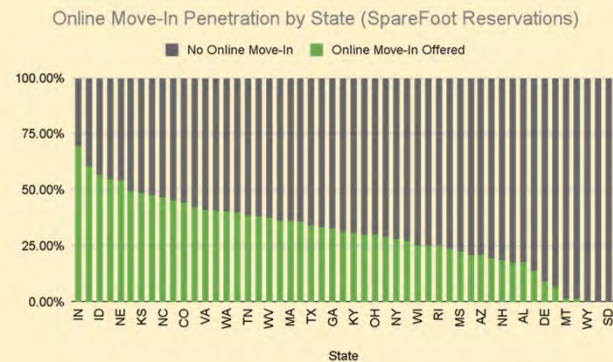
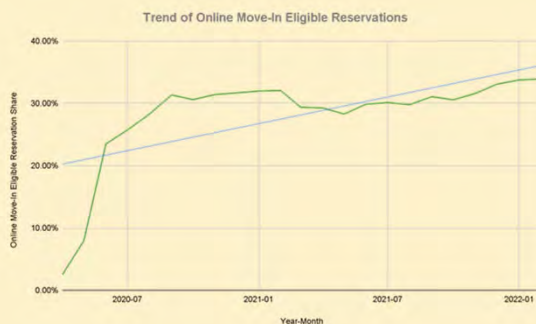
- Customers are routinely searching for storage and making reservations when facility offices are not open
- Off-Hours reservations move in at a lower rate than in-hours reservations (8.9% lower relative move-in rate)
- Operators with online move-in capabilities see much better move-in rates for off-hours reservations (6.24% better relative move-in rate)
- Operators with online move-in capabilities capture a significantly larger share of total reservation volume during off-hours periods



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OMI Adoption Growing, But Not Uniform



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What does unmanned really mean?



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Why did 10 Federal go unmanned?



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***Why has this
been so
successful...***



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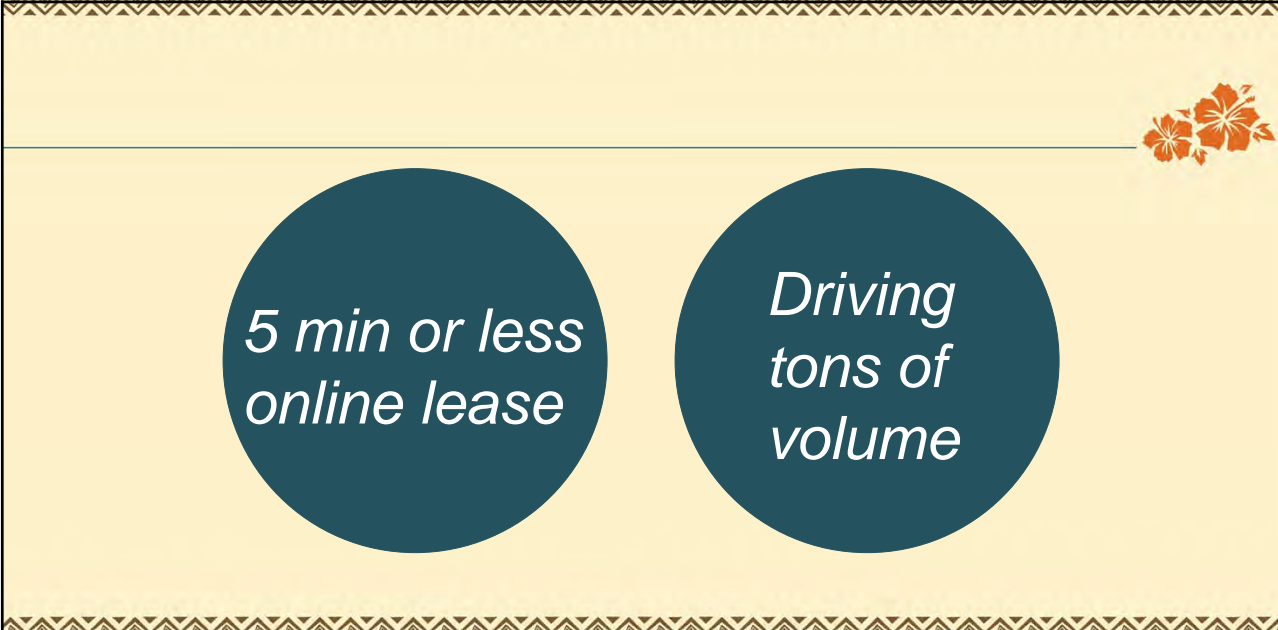


***It's not just about the
operations, it's about
how we market***




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*5 min or less
online lease*


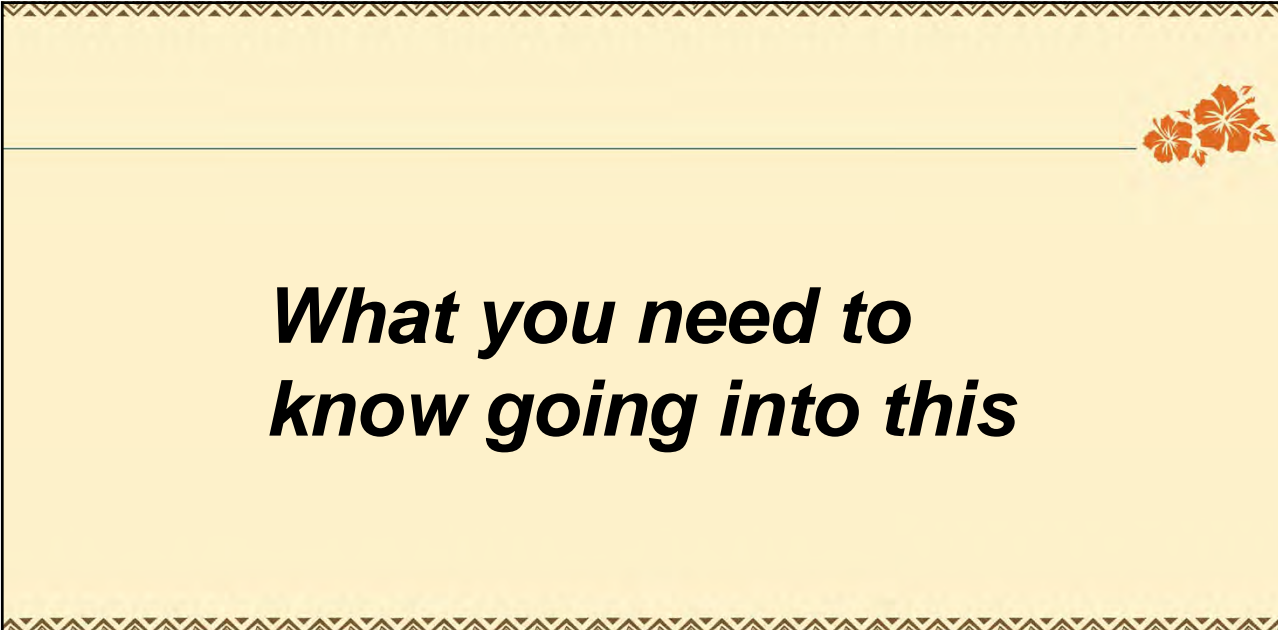
*Driving
tons of
volume*




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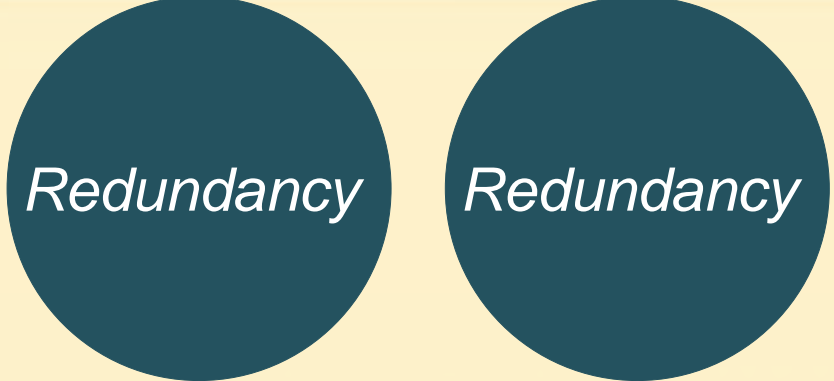

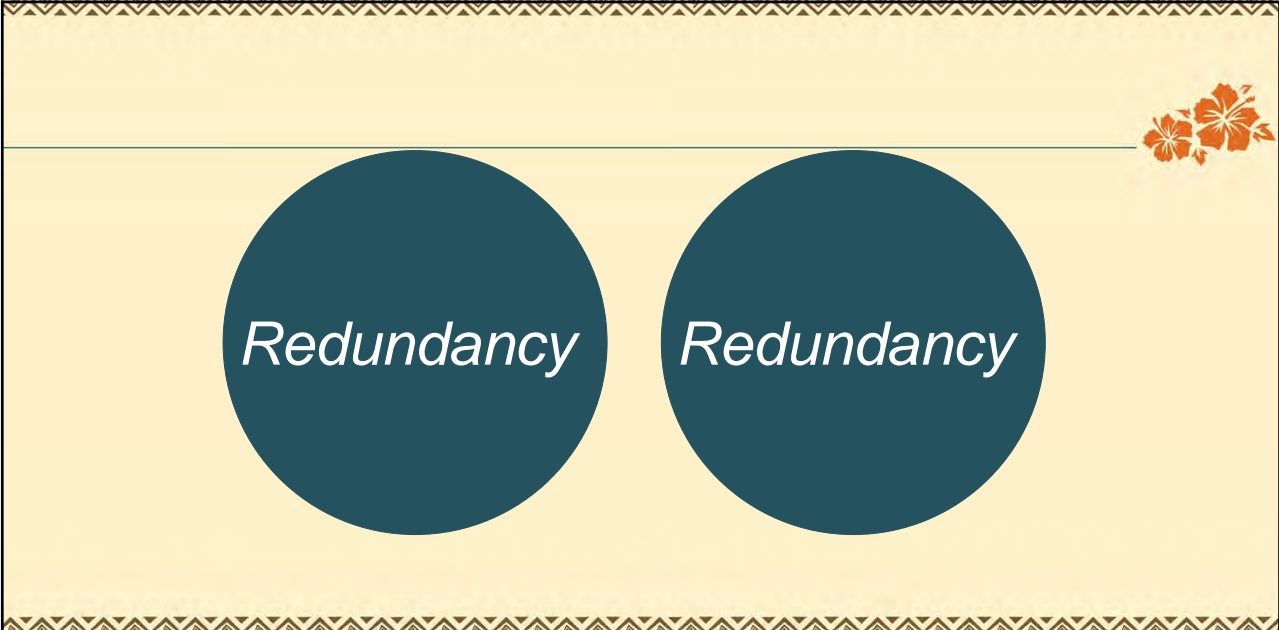
***What you need to
know going into this***




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Redundancy *Redundancy*



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*Average household
income over \$100K* *Average household
income under \$100K*



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Shift to digital marketing and engagement



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Lessons learned



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*When things go wrong,
they go wrong*

*People associate
unmanned and
unsecured*

*Integrated tech
is key*




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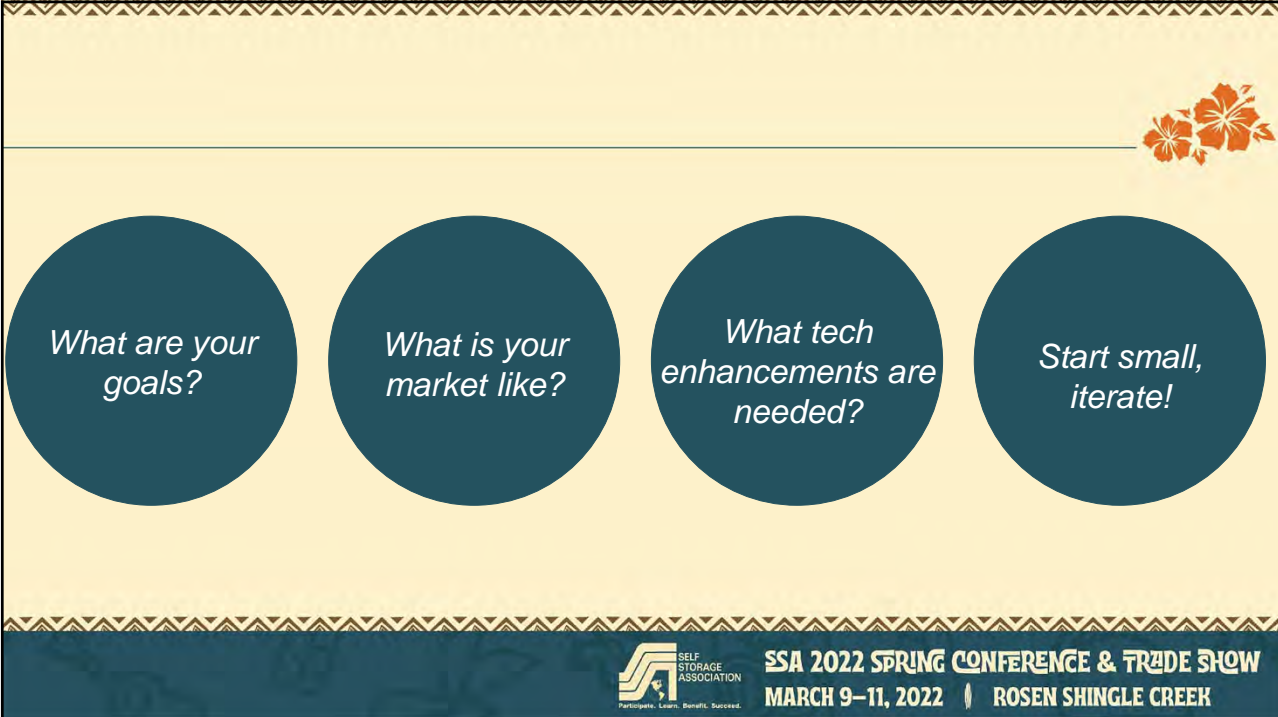

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18





What are your goals?

What is your market like?

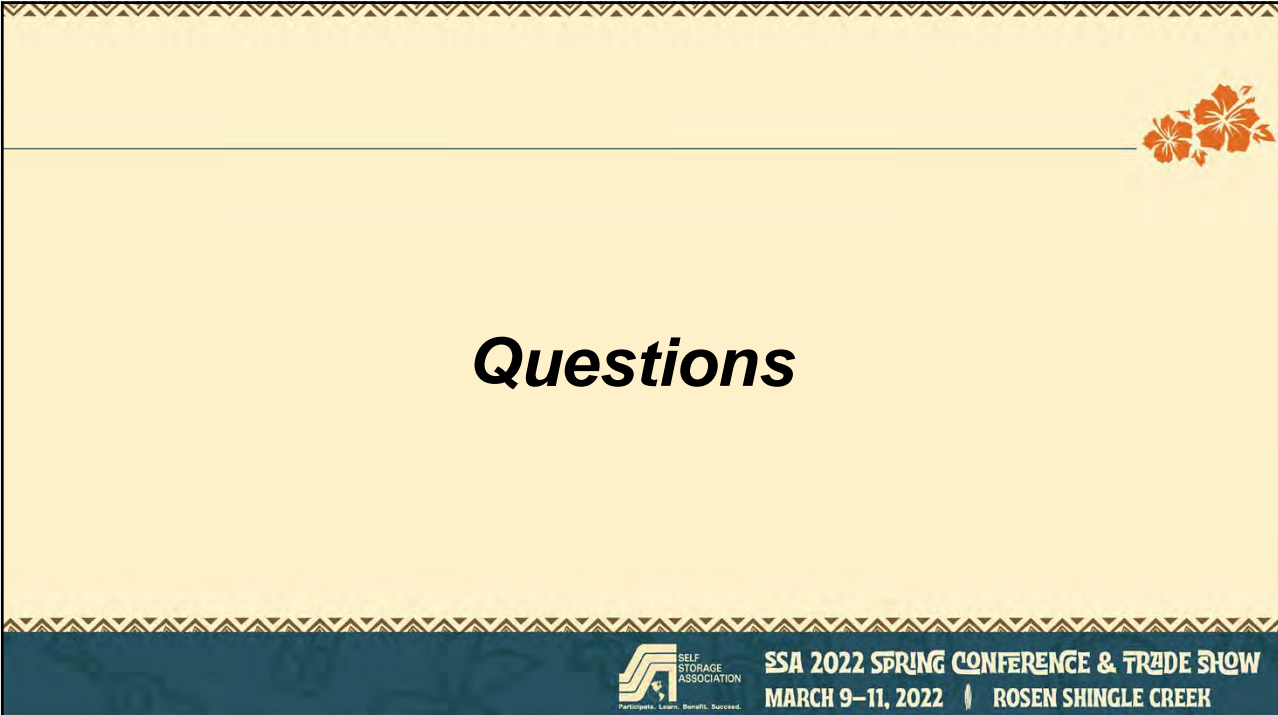

What tech enhancements are needed?

Start small, iterate!




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Questions



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SSA Women's Council Networking Session

Generously sponsored by





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Welcome to SSA Women's
Council Networking Session!

WOMEN'S COUNCIL
SELF STORAGE ASSOCIATION

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Own Your Ops

MAKORABCO

Storable

SIMPLY SELF STORAGE

WOMEN'S COUNCIL
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Women's Council Advisory Board



- Kristi Adams, OpenTech Alliance
- Anna Dwyer, Simply Self Storage
- Theresa Gallas, Janus International
- Jaclyn Hogan, CubeSmart
- Anastasia Malagisi, Xercor Insurance Services LLC
- Alyssa Quill, Storage Asset Management



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Agenda



- 5:00pm – 5:15pm Meet and Mingle
- 5:15pm – 5:45pm Speed Networking
- 5:45pm – 6:00pm Wrap up and head to SSA Reception



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Speed Networking Question Ideas



- How long have you been in the industry?
- How did you get into the industry?
- What's your current role in the industry?
- What's your favorite thing about your current job?
- What do you do for fun?
- Do you have a favorite book or class you've taken or are taking?
- What's an interesting fact about you ... Hobby? Passion? Interest?
- What's one of your favorite takeaways from this conference?
- Who did you meet at this conference that was a great connection? Why?
- What's one piece of helpful career-related advice that you received and want to share?
- What's your favorite place to travel and why?



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Thank you and see you in Las Vegas!



Search for SSA Women's Council on:



Email: gstengel@selfstorage.org



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FRIDAY **PRESENTATIONS**

SELF STORAGE ASSOCIATION 2022 SPRING CONFERENCE & TRADE SHOW

Handouts for speakers whose
presentations are scheduled for Friday
follow this page

Concurrent Educational Session

12 Reasons Social Media Marketing is Important for Your Self Storage Business

PRESENTER: Jessica Johnson, Storage Business Owners Alliance



SSA 2022 SPRING

Conference & Trade Show



12 Reasons Social Media Marketing is Important for your Self Storage Business

Storage Business Owners Alliance

MARCH 9–11, 2022



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Who here uses social media? 82% US Population



197M
54%



180M
70%



180M
40%



115M
59%



107M
59%



88M
26%

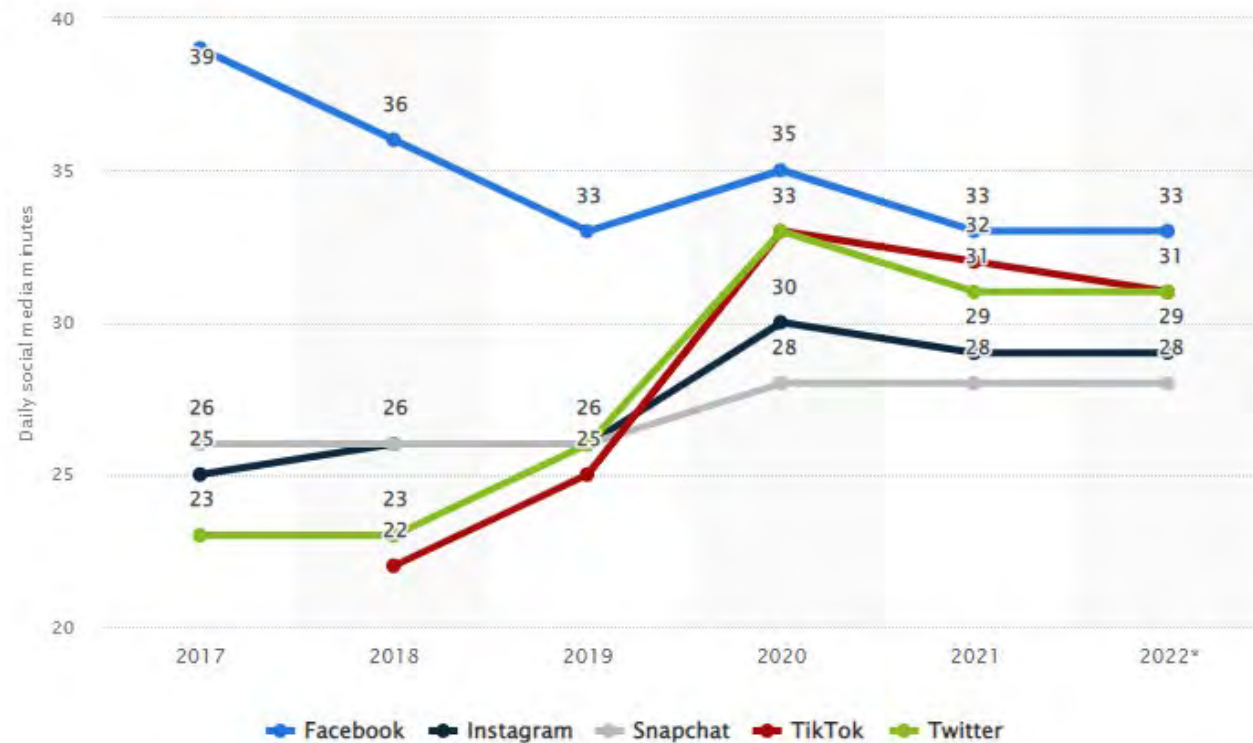


79M
19%



73M
46%

Social Media Usage - Avg. Mins per Day



© Statista 2022

- Facebook – 33 minutes
- TikTok – 29 minutes
- Twitter – 29 minutes
- Instagram – 28 minutes
- Snapchat – 27 minutes

The Marketing Funnel



Company Name



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#1 – Builds Brand Awareness



#1 – Builds Brand Awareness



- PERCEPTION
- FOSTERS TRUST
- CREATES A NETWORK
- CREATES ASSOCIATION
- BUILDS BRAND EQUITY



#1 – Builds Brand Awareness



- Give your brand some personality
- Fine tune your profiles
- Make your posts
- Tag others to get them talking
- Harness the power of #hashtags
- Creative commenting
- Repurpose your content
- Break your own news
- Experiment with your captions
- Use social as a tool for teaching
- Post consistently



Give your Brand Some Personality



Gate 5 Self Storage
February 19 at 7:25 AM

We may be closed this weekend but you can save money by renting a unit online. Go to Gate5SelfStorage.com

#gate5selfstorage.com
#loveaugusta
#fortgordon
#selfstorage #customerservice #morethanjuststorage #onlinerealtor

**Rent Online
Save Money**
Gate5SelfStorage.com

GATE 5 self-storage
Storage * Moving Supplies * Uhaul
706-790-1200
manager@gate5selfstorage.com
Gate5SelfStorage.com

Gate 5 Self Storage is in Augusta, Georgia.
February 16 at 9:57 AM

Give us a call 706-790-1200

#MoreThanJustStorage #hephzibahga #gate5selfstorage #selfstorage
#loveaugusta #customerservice #uhaulfamous
#gate5selfstorageanduhaul #uhaul #fortgordon #StorageUnitsNearMe
#storageunits #onlinerealtor

**YOU GET A FREE MOVE IN TRUCK,
YOU GET A FREE MOVE IN TRUCK**

**EVERYONE GETS A FREE MOVE
IN TRUCK WITH A STORAGE RENTAL!**

Gate 5 Self Storage
February 17 at 8:47 AM

It's going to be a hot one today...close to 80! Stay hydrated. If on property we have cold bottles of water or stop by our office for a cup of water from Divine Health Water 4 U.

Gate 5 Self Storage
February 14 at 7:00 PM

Makes a great Valentine gift!

Need a last minute gift?

GET PRINT AT HOME TICKETS ONLINE!

SOMETHING ROTTEN!
FEBRUARY 25th-27th 2022
Augusta Players Inc.

Scott Seidl
February 14 at 4:24 PM

OUT OF TIME AND NEED A GIFT?
Tickets are the perfect answer!
Take your Valentine to see SOMETHING ROTTEN!
presented by The Augusta Players Inc... See more

Gate 5 Self Storage was live.
February 9 at 8:47 AM

Weird Fact Wednesday

Gate 5 Self Storage
February 7 at 3:43 PM

Google
★★★★★

I stopped in on Friday to inquire about a storage unit and Amber was really awesome! She went over several options and answered all of my questions

Tara Edison

Gate 5 Self Storage
February 1 at 12:14 PM

Courtesy of our friends at The Storage Group:
Tuesday's Tip from Gate 5 Self Storage...
That "little" Golf Tournament that Augusta hosts each April is just over 80 days away. Start now with decluttering to make room for your rentals. By the time your renters arrive your home will be spotless... See more

DECLUTTER CHALLENGE
30 BAGS IN 30 DAYS

During the next 30 days, clean out your cupboards, closets, and drawers. Fill one bag a day to throw out, donate or sell.

Day 1 - Kitchen Cupboard	Day 17 - Toy Box
Day 2 - Kitchen Pantry	Day 18 - Desk Drawers
Day 3 - Kitchen Drawers	Day 19 - TV Cabinets
Day 4 - Under Kitchen Sink	Day 20 - Laundry Room
Day 5 - Junk Drawer	Day 21 - Old Magazines & Newspapers
Day 6 - Cleaning Supplies	Day 22 - Paperwork
Day 7 - Fridge & Freezer	Day 23 - Art & Craft Supplies
Day 8 - Linen Closet	Day 24 - Holiday Decorations
Day 9 - Bedroom Closets	Day 25 - DVD's & CDs
Day 10 - Highschool Drawers	Day 26 - Car
Day 11 - Sheds	Day 27 - Garage Shelves & Storage
Day 12 - Master Bathroom	
Day 13 - Guest Bathroom	

Gate 5 Self Storage is at Gate 5 Self Storage.
February 15 at 6:00 AM - Hephzibah, GA

Tuesday Tip from Gate 5! Fortunately right now we do have climate controlled units available.
Go online to gate5selfstorage.com or give us a call 706-790-1200.

#MoreThanJustStorage #hephzibahga #gate5selfstorage #selfstorage
#loveaugusta #customerservice #uhaulfamous
#gate5selfstorageanduhaul #uhaul #fortgordon #StorageUnitsNearMe
#StorageUnits #onlinerealtor #Augusta #TuesdayTip #TuesdayTips

Storage Tip #71
Climate-controlled storage is recommended for valuable, temperature-sensitive items.

Gate 5 Self Storage is at Gate 5 Self Storage.
January 31 at 3:06 PM - Hephzibah, GA

Did you know this about Gate 5?

Did you know?

- We are an authorized U-haul Dealer!
- We pay for referrals!
- We offer a 10% Military Discount!
- We sell storage and moving supplies!

GATE 5 self-storage

#psing #MoreThanJustStorage #fortgordon #evangel #gate5selfstorage #selfstorage #uhaulfamous #loveaugusta #augusta #StorageExperts #hephzibah #storagetips #uhaul #fortgordon #StorageUnitsNearMe #onlinerealtor

Gate 5 Self Storage is at Gate 5 Self Storage.
January 29 at 10:32 AM - Hephzibah, GA

This cool cat is working today. Go visit Ra Genica today. She'll set you up in a new unit and/or Uhaul!
Give her a call 706-790-1200

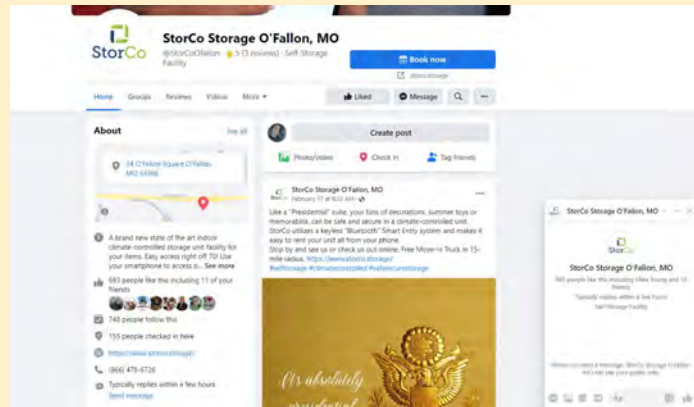
#psing #MoreThanJustStorage #fortgordon #evangel #gate5selfstorage #selfstorage #uhaulfamous #loveaugusta #augusta #StorageExperts #hephzibah #storagetips #uhaul #fortgordon #StorageUnitsNearMe #onlinerealtor #customerservice

Storage Business Owners Alliance



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Give your Brand Some Personality



StorCo Storage O'Fallon, MO
January 7 · 🌐

Store with us this after the Christmas season! When you rent any unit, we will give you an additional 5x5 unit for ONLY \$5! Call us or visit our website to get more details!

Storco.storage
866-478-6726



StorCo Storage O'Fallon, MO
November 26, 2021 · 🌐

Santa's Helper can keep peeking eyes from opening gifts to soon. Read our blog to discover how a StorCo storage unit can be the perfect Santa's Helper.
<https://www.storco.storage/.../self-storage-for-santas.../>



Like Comment Share

StorCo Storage O'Fallon, MO
December 28, 2020 · 🌐

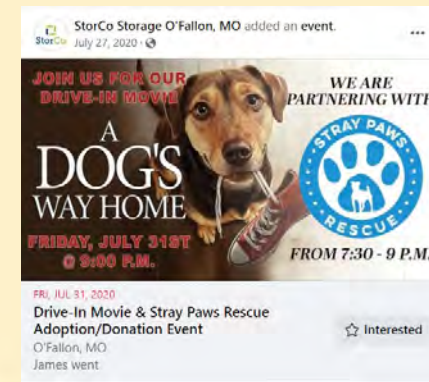
At StorCo, did you know that you can rent a storage unit from the comfort of your own home? Go to our website at www.StorCo.storage to get set up today!!



StorCo Storage O'Fallon, MO
June 19, 2021 · 🌐

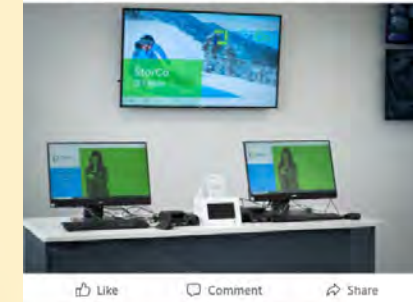
FINALLY it is tonight--RAYA AND THE LAST DRAGON at the StorCo Parking Lot!

June 19th @ 9pm-----COME at 8pm to get your spot. Make sure to bring chairs, blankets, and coolers to enjoy during the movie.... See more



StorCo Storage O'Fallon, MO
December 17, 2020 · 🌐

We have a few different ways to make registering for a storage unit quick & hassle free!! One of them is to come into our store and let one of our friendly staff walk you through our simple process.



Like Comment Share

Storage Business Owners Alliance



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#2 – Generate Leads/Followers



- Launch compelling lead magnet offers
- Share testimonials as social proof – **REVIEWS!**
- Create targeted ads with special offers
- Make the most of lead generation ads
- Launch a referral campaign
- Make the most of social listening
- Use chatbot features where available



#3 – Nurture Leads/Followers



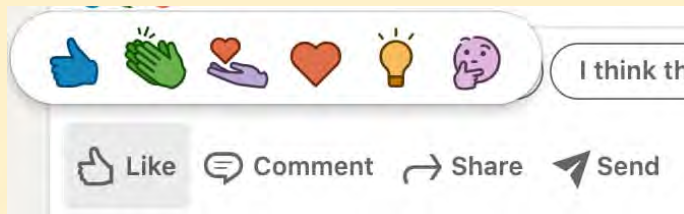
- Provide them with free content to build trust
- Engage with your social media followers regularly
- QR codes that refers customers to follow pages
- Post relevant and engaging content
- Make it personal
- Get involved!
- Make your followers feel special
- Be authentic and consistent
- ASK – LISTEN - EXECUTE



#4 – Implement Social Listening



- What is social listening?
- 2 step process
- Social media sentiments
- If you aren't listening, you will create strategies with blinders on
- Industry and competitor intelligence – follow your competitors



#5 – Connect Social Posts to Opportunities



- Drive website traffic
 - Improves the quality and quantity of inbound website traffic
 - No longer have to solely rely on SEO and being found on Google
 - Use teasers to hook audience to want more
- Discover new ideas and trends
- Connect with existing and new audiences in deeper ways
- Gain followers on your other pages
- Interaction opportunities
- Reviews




Include your website address on every social media profiles

#6 – Measure Marketing Efforts



Awareness Metrics Audience Growth Rate

$$\frac{\text{Net New Followers}}{\text{Total Audience}} \times 100 = \text{Growth Rate Percentage}$$


Note: You can track your competitors' progress the same way.

Awareness Metrics Post Reach

$$\frac{\text{Measure Post Reach}}{\text{Total Followers}} \times 100 = \text{Post Reach Percentage}$$


Note: On Facebook, the “When Your Fans Are Online” feature will tell you the optimal time to post. Use this data to increase your reach.

#6 – Measure Marketing Efforts



Engagement Metrics Average Engagement Rate

$$\frac{\text{Total Likes, Comments \& Shares}}{\text{Total Followers}} \times 100 = \text{Average Engagement Rate Percent}$$


Note: The benchmark for this metric is different on every platform.

Conversion Metrics Conversion Rate


$$\frac{\text{Conversions}}{\text{Total Clicks}} \times 100 = \text{Conversion Rate Percentage}$$


Note: A post's conversion rate can be high even if traffic is low. The two metrics are mutually exclusive.

#6 – Measure Marketing Efforts




Conversion Metrics Click-Through Rate (CTR)

$$\frac{\text{Total Clicks}}{\text{Total Impressions}} \times 100 = \text{CTR Percentage}$$


Note: Don't forget to measure clicks and impressions within the same reporting period.

Engagement Metrics Cost-Per-Click (CPC)

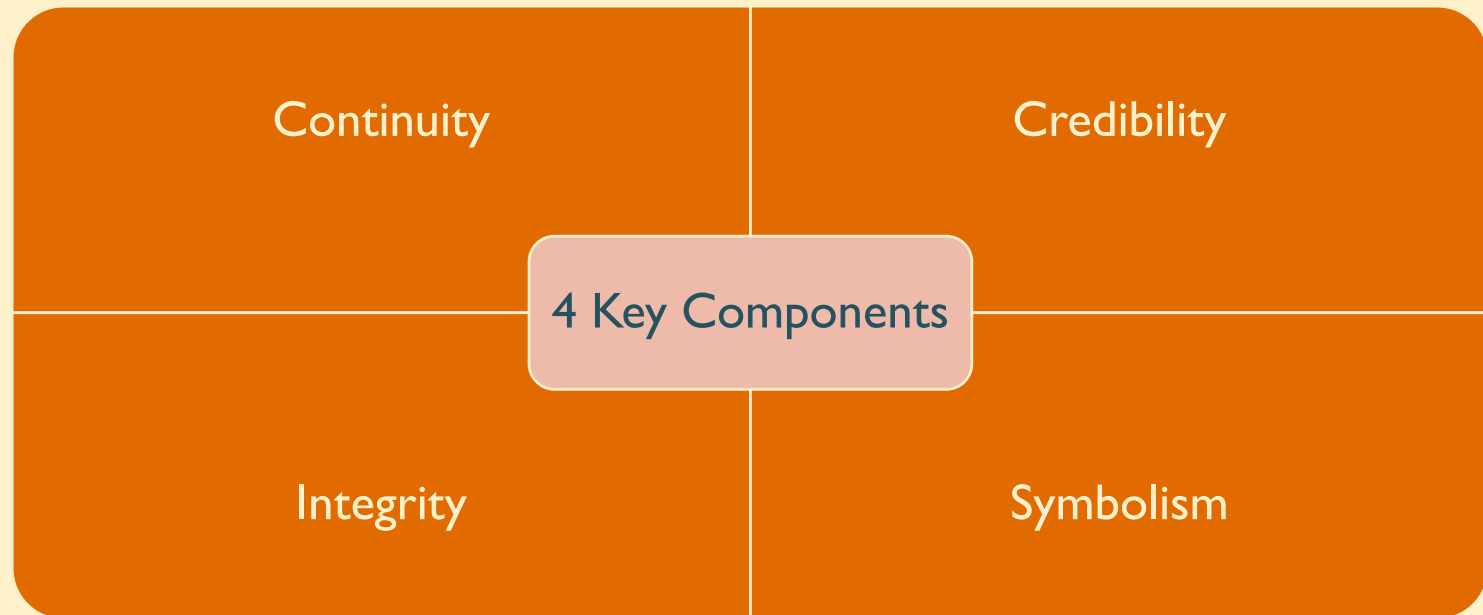
$$\frac{\text{Total Ad Spend}}{\text{Total Measured Clicks}} \times 1000 = \text{Cost-Per-Click}$$


Note: Never let your CPC campaigns go unattended for an extended period of time.

#7 – Build Brand Authenticity



- What is brand authenticity?
- Why is it important?



#7 – Builds Brand Authenticity



- How do you build brand authenticity?
 - Be REAL!
 - Connect through stories
 - Become the trusted source
 - Keep it consistent
 - Communicate clearly with your audience
 - Be innovative



#8 – Drive Thought Leadership



- Understand your target audience
- Be professional
- Post content consistently
- Engage - join relevant groups and participate in discussions
- Network with industry leaders and influencers
- Answer questions
- Demonstrates how helpful your brand is
- Grows your audience



#9 – Grows Your Audience



- Hold Contests
- Include a visual with every post
- Share more videos
- Be a proactive listener and responder to your online community
- Change your profile photos and cover photos often
- Give people a reason to follow your pages
- Encourage tagging
- Use hashtags to get found
- Be entertaining and use humor when possible



#10 – Builds A Community



- Engage with your followers
- Post with purpose
- Hold Q&A sessions in your stories
- Create an audience poll
- Recognize recurring fans
- Re-share user generated content



#11 – Generate Unique Content




- Share positive stats and news
- Share user-generated content
- Leverage influencers if available
- Personalize the content
- Create less promotional content
- Offer freebies
- Post social proof
- Design your content well
- Avoid controversial topics
- Post “how to” or tutorial videos
- Support the local community and campaign for social causes



Partner with influencers







800-784-9176
24/7 Sales & Support

My Account

LocationsStorage OptionsStorage ServicesAmbassadorsAbout Us

Make Room for **Awesome**®



TONY HAWK
12X World Champion Skateboarder
StorQuest Customer

Storage Business Owners Alliance



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#12 – Stay Top-of-Mind with your Customers



- TOMA – “Top-of-Mind-Awareness”
- Stand out! Be unique and different!
- Post consistently
- Use creative taglines or slogans
- Sponsor events or host meet-ups
- Share educational content
- Be SOCIAL on social!
- Make social videos
- Connect emotionally
- Go LIVE!



Social Media Strategy Planning



- What are the goals and how will you measure them?
- What type of content will you post?
- When will you post?
- What channels will you prioritize?
- Who will create and distribute content?
- How will you encourage employees to share content?

Contact Info



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Storage Business Owners Alliance
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Concurrent Educational Session

**Taxes Just Went Up—Learn
Strategies and Tips to Keep
Them Down**

**PRESENTER: Warren Dazzio, CSSI-Cost
Segregation Services, Inc.**



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Taxes Just Went Up - Learn Strategies and Tips to Keep Them Down

Cash Flow Available for Self Storage Owners

CSSI – Cost Segregation Services **MARCH 9–11, 2022** | **ROSEN SHINGLE CREEK**

1



Hello From CSSI!



Warren Dazzio
Executive Vice President
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225.241.9823
Wd.CSSIstudy.com

CSSI – Cost Segregation Services, Inc.

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Who is CSSI?

We are the calculation experts of the industry.

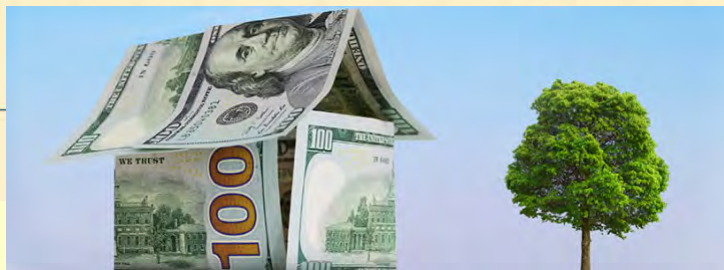


- We are the nation's premier engineering-based consulting firm specializing in the tax laws surrounding commercial buildings.
- Performing engineering-based studies for over 18 years
- 20,000+ studies performed in all 50 states
- Our CEO, Jim Shreve, has been involved in Cost Segregation since the original court case in 1997.
- Completed studies in 6-8 weeks
 - Cost Segregation and Disposition
 - Capital to Expense Reversals
 - LED Lighting & HVAC Retrofits and Tax Benefits Analysis
 - R&D Tax Credit Analysis
 - We represent our study in the event of an audit at no cost to our clients



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"A **tax loophole** is something that benefits the other guy. If it benefits you, it is **tax reform**."

Former Democratic Senator Russell B Long LA




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Looming Tax Increases


- General Theme is Let's Repeal TCJA



- They are not talking about Tax Increases they are talking about repealing the Tax Cuts and Jobs Act when in effect the same thing is happening.
- Current Verbiage - Develop a framework and figure out the details later. This is Troubling.
 - Repealing the TCJA could get rid of Bonus
 - Likely keep 15 year QIP but Repealing TCJA could remove Bonus from QIP
 - Eliminate 1031 Exchange – Doesn't appear to be on the table
 - Eliminate Step Up in Basis – Doesn't appear to be on the table



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Looming Tax Increases


What do we know from the House Ways and Means Committee first draft




- Tax bracket for ordinary income
 - 37% to 39.6%
- Corporate Tax Rates
 - 21% - 26.5%

Impact to Self Storage Owners

- Increases your taxes



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Looming Tax Increases

Sales and Estates



- Capital Gains
 - 20% - 25%
- Reduce the Estate exemption from \$11+ Million to \$6+ Million
 - It does not take much to reach this limit if you own your own business.
- Significant Changes to Trusts and Estates.
- More Audits on the Way?
 - Expanding funding for IRS and for audits
 - Owners will need to look for ways to minimize their Tax Burdens.
 - Expanding audits increases the need to back up your numbers
 - What Strategies can help?





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How Do These Strategies Affect You and Your Business?



Make you aware of significant tax deductions available to owners purchasing or renovating a building under recent tax laws.

- Generally
 - Strategies to decrease federal taxes and increase cash flow
 - Provides Cash flow to:
 - Invest
 - Buy New Properties
 - Make Improvements to Existing Properties and Increase Rent

Affects every commercial property owner in the US

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Complex Compliance Issues and Huge Economic Benefit

- Who can benefit from this?
 - Owner of recently purchased or built building
 - Owner who has owned a building for several years
 - Owner/tenant who has paid for past improvements or repairs
 - Estate planning & trusts
 - Triple Net (NNN) Lease tenants and owners
- Largest beneficiaries will be landlords & multi-property owners
 - Apartments, condos, hotels
 - Self storage, warehouses
 - Nursing homes, assisted living
 - Hospitals, medical, dental
 - Offices, banks, auto dealers
 - Franchises, restaurants
 - Retail Strip Centers, malls, supermarkets
 - Any building type

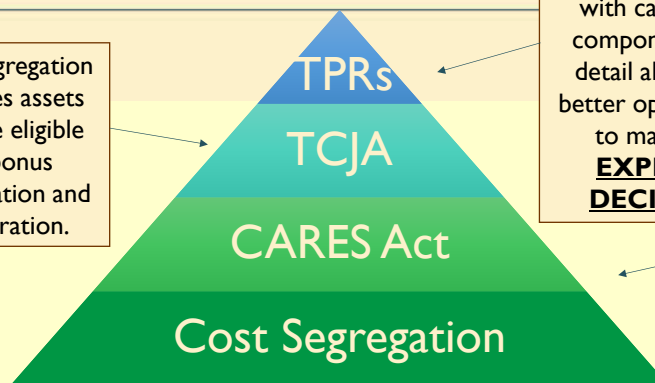


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Perfect Storm of Tax Laws to Benefit Retrofits and New Construction

Cost Segregation identifies assets with life eligible for bonus depreciation and acceleration.



TPR works best with calculated component cost detail allowing a better opportunity to make the **EXPENSE DECISION.**

QIP now qualifies for Bonus Depreciation and can contribute to lower taxes

Solid Foundation: comprised of an engineering-based Cost Segregation study; provides detail components, units of property, building systems, major structural components.



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The 2014 Repair Regulations

What are the Tangible Property Regulations?

- US Tax Code provides guidance on treatments of amounts paid to acquire, produce or improve tangible personal property – Buildings, equipment, improvements, etc...
- One significant part is applied to Improvements or Repairs to existing property as items that you must:
 - **CAPITALIZE**: and carry on a depreciation schedule.
 - Or
 - **EXPENSE**: allowed to write off in the year of the expenditure.
- The Repair Regulations define the elements outlined and create a consistent method for all tax payers.



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When to Capitalize or Expense

Must Capitalize if an Improvement (RABI) or Major Expenditure

Improvement = Restoration, Adaptation, Betterment, Improvement (RABI)

Major Expenditure = More than 30%-35% of the REPLACEMENT cost of the building system, structural component or unit of property (40% of Roof Replaced = Capitalize). Building must be in service for two years in order to apply repairs based on 30-40% of the buildings system.

A capital expenditure generally puts a more permanent increment in the longevity, utility, or worth of the property.

Must Expense if = Repair

If the expenditure does not materially increase capacity, productivity, efficiency, strength, quality or improve output of the building system, structural component, or Building (Unit of Property) it must be expensed.

A repair keeps the building structure and building system in ordinary and efficient operating condition.

Difference = “**put**” in service or “**keep**” in operating condition.



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The 2014 Repair Regulations

- Must capitalize if an Improvement:
- **RABI**
 - **Restoration:** if the expenditure occurred less than two years after owning the building
 - **Adaptation:** if the expenditure changed the original intent and function of the building
 - **Betterment:** the expenditure materially increases the capacity, productivity, efficiency, strength, quality or improve the output of the building system, structural component or any component that serves a major and critical function
 - **Improvement:** the expenditure modifies a major portion (greater than 33%) of the building, building structure or building component that serves a major and critical function



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Workflow to maximize cash flow through expenses or depreciation deductions

Safe Harbors

Is the expenditure NOT an improvement and does it fall under the DMSH, RMSH or STSH? If yes, write it down. Define the building systems? *Move to next step.*

Major Improvement

Is the expenditure greater than 35% of the replacement cost of the building system? Does it serve a major and critical function? *If not, write it down. If yes to both, capitalize it and move to next step.*

Maximize Depreciation Expense

After a cost seg is performed, maximize the depreciation expense by applying 100% bonus depreciation on all assets with a class life less than 20 years or Section 179 to personal property and QIP

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

STEP 6

Decide: Improvement or Repair?

Does the expenditure meet the definition of one of the 16 RABI rules making it an improvement? *If not, it can be called a repair and can be written down. If yes, move to next step.*

Determine

Will a cost-segregation study or a partial-asset disposition-and-removal calculation save taxes? If so, contact a reputable cost seg firm or calculate the basis using PPI.

Decide

What is the best way to invest your tax savings?



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What is Cost Segregation?

Cost Segregation = Cash Flow

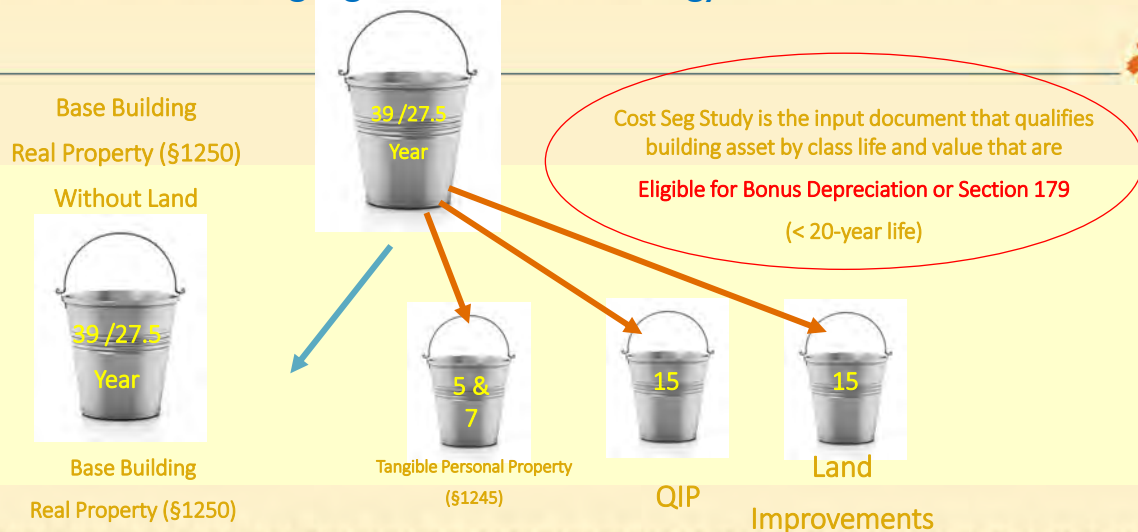
- The process of analyzing and identifying commercial building components that are eligible for accelerated depreciation
- Result is lower income taxes
- An input calculation to the U.S. Tax Code – Building Systems Valuation
- Allows building owners to use cash today instead of leaving it with the government for 39 years – time value of money
- Personal property is segregated from real property
- **Benchmark: \$30K-\$80k per \$1 Million in cost over five years**
- Buildings or tenant improvements as small as \$200,000 in cost



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Cost Segregation Bucket Analogy



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Cost Segregation Bucket Analogy



Base Building
Real Property (\$1250)

- Structural
- Foundation
- Walls
- Doors/Windows
- HVAC
- Plumbing
- Electrical
- Building Systems



Tangible
Personal Property (\$1245)

- Interior Doors
- Wall partitions
- Security /Camera
- Cabinets /Counter tops
- Specialty Plumbing
- Specialty Electrical
- Appliances



QIP
Real Property (\$1250)

- Interior Renovations
- Sheet Rock
- Flooring
- Lighting
- Int. Plumbing / Elec
- Int. HVAC
- Paint



Land Improvements

- Parking Lot/Striping
- Concrete/Asphalt
- Signs/Flagpole
- Landscaping
- Light Poles
- Fences / Gates

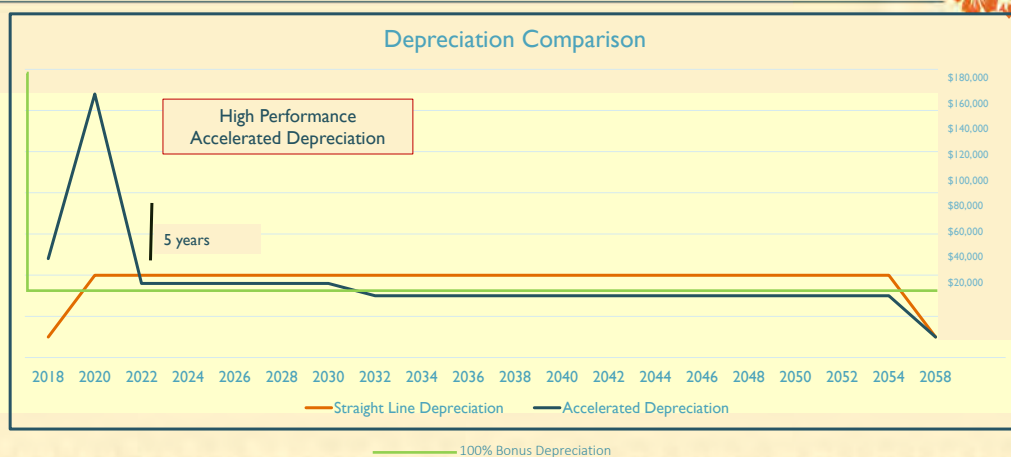


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What is Cost Segregation?

Items that can be Accelerated



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Cost Segregation: Case Studies

Self Storage

- 2017 purchase: \$859,842
 - Non-climate control
 - Tax savings of \$45,981**
- 2021 construction: \$3.6M
 - Climate control
 - Tax savings of \$569,235**



- Big Box Portfolio Converted to Self Storage (8 Locations)
 - Newly Purchased 2018-2020 and Renovated
 - Created a 2017 deduction of \$10.1 Million
- Client tax savings of \$4,010,173**

Works with all types of buildings Including Residential Rental



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Cost Segregation: Case Studies



Office / Warehouse

- 2020 purchase: \$3.3M
 - 10% office
 - 90% warehouse
 - Deduction of \$334,660
- Tax Savings of \$123,824**

Apartment

- 2020 Purchase: \$921,500
- Deduction of \$223,658
- Tax savings of \$82,753**



20 Property Portfolio

- Purchased 1994-2019
- 2020 Study + Repair Regs
- Offices, Strip Centers, Warehouses, Car Museums, Etc..
- Created a \$1.2 Million deduction
- Tax savings of \$467,082**



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Tax Tip

- Time your renovations to coincide with the increase in taxes and thereby reduce more taxable income. You may be able to deduct the full renovation or expense the items that were thrown in the trash and reduce your taxable income.



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Follow this link!
Provide Your Property Details for Analysis!

<https://bit.ly/CSSIWD>



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Partial Asset Disposition Election

Ability to write off assets that are no longer in use

- **LED Retrofit Projects**
- Renovations, remodels, and replacements
- Abandoned in place
- Common items – doors, roof, HVAC, electrical
- Retirement of a structural component of or improvement to a building
 - Partial Asset Dispositions must be taken in the same year as the renovation
 - Tax savings at sale of property = decreases taxable personal property
- Action: Did you renovate this tax year?



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Janus White Paper

Partial Asset Disposition Case Study with Cost Segregation



Self Storage Renovation Tax Savings

	Original Building	Demolition	Bonus on New
Cash Flow	\$545,607	\$20,812	\$18,712
Total Tax Savings	\$585,131		



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Tax Tip

Any renovation project you are making should be viewed in the lens of taxes as well as facility and materials. This can be applied to most renovation projects like replacing doors or a roof. CSSI's Energy Services division applies this strategy to its LED projects.



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CSSI Energy Services Net Zero Cost Lighting Projects

- Use Energy Savings
- Maintenance Savings
- HVAC Savings
- Utility Rebates
- Technology Gains and Integrations
- Partial Asset Disposition – Tax benefit when tearing old lights out
- Bonus Depreciation – Tax benefit when putting new LEDs in
- Cost Segregation – Tax benefit generates cash from your whole facility
- 179D EPACT Energy Efficiency Incentives



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LED Project - Optimal Tax Savings


Financial Summary	
Project Cost	\$115,577.96
Tax 8.5%	\$2,655.00
Less Local Utility Rebates*	\$15,231.50
Less Analysis Resulting from Tax Savings of Repair Regulations**	\$15,561.24
Less 100% Bonus Depreciation QIP Tax Savings (if available)***	\$43,746.20
Less Cost Segregation Tax Savings	\$86,776.00
Net Project Cost	(\$43,081.98)

Accumulated Cash Flow	
Year 1	-\$21,813.02
Year 5	\$65,710.98
Year 10	\$173,739.66
Simple Payback in Years	0.0
Simple Return on Investment (ROI)	-403.28%
Net Present Value (NPV)	\$102,381.28
Internal Rate of Return	49.08%
Monthly Cost of Delay	\$1,823.42


Finance Options - 72 Months		
Monthly Fee	Monthly Energy Savings	Cash Flow Positive
\$1,715.53	\$1,823.42	\$107.89



Energy Savings
Rebates
PAD
Bonus/ QIP
Cost Segregation
=
\$161,321 in
Additional
Cash Flow



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2017 Tax Cuts and Jobs Act

More Deductions for You

- 100% Bonus Depreciation for properties purchased or built after September 27, 2017
- **CARES Act change: Any Qualified Improvement Property (now defined as 15-year) placed in-service after 9/27/2017 is eligible for 100% Bonus Depreciation.**
- New purchase, new construction, addition, or renovation
- The assets must have a depreciable life of less than 20 year
- Cost Segregation Studies identify 5-, 7-, & 15-year assets within buildings
- **Benchmark: \$30K-\$80k per \$1Million in cost in first year**



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Bonus Depreciation Example

\$8M Self-Storage Facility (Purchased November 2017)

Deductions	
Straight-line	\$26,000
Accelerated	\$154,000
Bonus	\$700,000



\$26,000 vs. \$700,000 in deductions

\$259,000 in tax savings



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Tax Tip

- Cost Segregation is a good tool to help identify items for 100% Bonus Depreciation to help reduce your taxable income and increase cash flow. Take advantage of Cost Segregation and 100% bonus for the 2021 tax year. The administration has suggested reducing Bonus to 50% as early as 2022. So, get it while you can.



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Filing questions



- These Processes work with
 - New Purchases
 - New Construction
 - Buildings you have owned for many years
 - Recent improvements even if you have older buildings
- Capture this:
 - On your current tax return without amending a return or
 - Use to reduce Quarterly Estimates.

Expected Results – Lower income taxes and increased cash flow



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Tax Tip



Consider selling some assets now and taking advantage of the current tax rates while you can. The changes being proposed will undoubtedly increase estate taxes and capital gains significantly.



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How to Get Started

Let us Provide a No-Cost Predictive Analysis!



1. For the most accurate analysis, provide a depreciation schedule or a few data points:
 1. Type of Building
 2. Cost (without land)
 3. Year and month acquired
 4. Address
2. CSSI will generate an analysis at no-cost with fixed fee and potential savings.
3. We will work with you and your CPA to complete the work.



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Thank You for Joining Us Today!



Warren Dazzio
 Executive Vice President
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Let us run the
 numbers for
 you!

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My CPA Has Already Done This

The Tax Professional Method vs. Engineering-Based Method



Example Economic Comparison		
	Potential Accounting Method	Engineering-based Cost Segregation
39-year Straight Line Method	\$104,304	\$104,304
Alternative Method		
5-year Depreciation Expense	\$91,136	\$205,056
15-year Depreciation Expense	\$11,064	\$29,504
39-year Depreciation Expense	\$92,831	\$77,185
Total Depreciation Expense	\$195,031	\$311,745
Cash Flow Results		
Increased Accumulated Depreciation Expense	\$90,727	\$207,441
Estimated Tax Rate	36.0%	36.0%
Estimated Tax Savings Benefit	\$32,662	\$74,679
Increased Cash Savings	\$42,017	

Many Tax Professionals will take the low hanging fruit—items whose values are easily identified—and move those into a shorter life category. Our team specializes in this tax law so we look at everything. You may be leaving some money on the table. Let us provide a no cost analysis to bring these savings to you.

An independent firm is recommended (and often required) to take all of the accelerated depreciation that current tax law allows. We will partner with your Tax Professional to bring this to you.



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I Don't Want to Trigger an Audit



Cost Segregation is a Safe and Recommended Method of Depreciation.

“The cost segregation technique is no more aggressive than using any permissible depreciation method under the IRC.”
 - Journal of Accountancy

“Cost Segregation is a proven tax strategy.”
 - Dave Ramsey – National Talk Show Host and NY Times Best Selling Author



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Recapture & 1031 Exchanges

- Recapture
 - Diminished Value
 - Perform Cost Seg Study on New Building to offset Capital Gains of Sold Building

1031 Exchange

- Cost Segregation Identifies and Segregates Personal Property from Real Property
- Only Real Property can be Exchanged in a 1031 Exchange
- Recapture on Personal Property at Ordinary Income Tax Rate
- Recapture from the first building can be offset by Performing a Cost Seg on the Basis in the New Building.
- Key: Make sure there is a Basis in the new property.



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Thank You for Joining Us Today!

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Let us run the
 numbers for
 you!

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Concurrent Educational Session

**SSA Updated the Lien
Laws—Now You Have to
Update Your Leases and
Processes**

**PRESENTER: Lonnie Bickford,
StorageAuctions.com / Appletree Storage**

Concurrent Educational Session

Technology from an Operator's Eye View

PRESENTER: Jennifer Shaver, Janus International



0

OUR PRESENTER



JENNIFER SHAVER
TRAINING AND DEVELOPMENT MANAGER AT JANUS

Jennifer Shaver is the Training and Development Manager for Noke Smart Entry by Janus. Jennifer has worked her way up through the storage ranks from a facility manager to regional management for private and third-party operators, and now uses that experience to teach clients best practices when transitioning from traditional storage to smart access. This work includes writing training and education materials, hosting webinars and working to enhance product features and support. Jennifer is passionate about helping the self-storage industry leverage technology to stand out from competition, improve and find efficiencies in storage operations and elevate their tenant's experience.

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INTERNATIONAL GROUP

1

WHAT YOU'LL LEARN

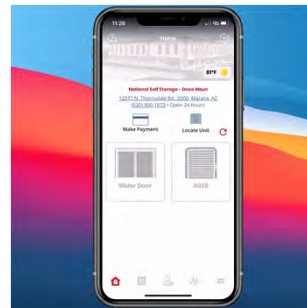
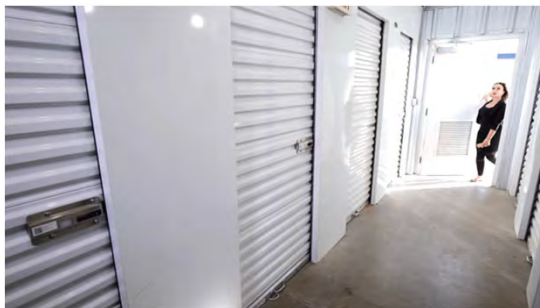
1. WE KNOW HOW TECHNOLOGY PROVIDERS FEEL ABOUT TECHNOLOGY, BUT HOW DO OWNER/OPERATORS SAY IT AFFECTS THEIR BUSINESS?
2. WHAT DO THEY SEE WHEN THEY ARE ONSITE?
3. IS IT TRULY ACCEPTED BY CUSTOMERS?

THIS SESSION WILL SHOW YOU AN UNFILTERED VIEW AND RESPONSE TO TECHNOLOGY IN SELF STORAGE OPERATIONS



2

AUTOMATION MEANS CUSTOMIZATION




- DOESN'T HAVE TO MEAN UNMANNED, OFFERS OPPORTUNITIES TO DECIDE STAFFING NEEDS
- REAL-TIME NOTIFICATIONS AND DATA FOR DECISION
- MEET CUSTOMERS EXPECTATION TO DO BUSINESS WITH YOU ON THEIR TERMS, REMOVES BARRIERS WE PUT IN PLACE TO AUTHENTICATE WHO IS RENTING AT THE FACILITY




3

JS5
JS6
JS7
JS8


TECHNOLOGY IN STORAGE OPERATIONS ISN'T A NEW CONCEPT




MARKETING CAMPAIGNS
ARE RELIANT ON SEO
OPTIMIZATION, PPC ADS,
GMB PANEL AND
AGGREGATORS




BUYING EXPERIENCE
ONLINE RESERVATIONS
& RENTALS, E-SIGN
LEASE DOCUMENTS,
KIOSKS & CALL
CENTERS



DATA DOCUMENTING
YOUR TENANT
PURCHASING BEHAVIOR
TO GET THE BEST
RESULTS AND BANG
FOR YOUR BUCK



CLOUD BASED
PROPERTY
MANAGEMENT
SOFTWARE, TENANT
SELF-HELP STATIONS,
NVR TO VIEW CAMERAS
REMOTELY


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INTERNATIONAL GROUP

4

CONSTANTLY TRYING TO CONNECT THE DOTS

- WHY ARE WE TRENDING WELL YOY OR WHY ARE WE NOT MEETING BUDGET EXPECTATIONS?
- WE ANALYZE OUR MANAGEMENT SUMMARY TO SCOUR IT FOR THESE CLUES
- BUT IT TAKES COMPLETING PHYSICAL SITE AUDITS TO FIND THE SOURCE OF OUR RESULTS BECAUSE WE DON'T HAVE ENOUGH INFORMATION AVAILABLE REMOTELY

JS1
JS2

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INTERNATIONAL GROUP

5

Slide 5

- JS5** Over the last two decades, technology has been trickling further into the self storage industry step by step at a continual pace
Jennifer Shaver, 3/3/2022
- JS6** I was working at a Levi's retail store at an Outlet Mall in California. Besides our local shoppers, we had daily tour busses of visting foreigners who parked to shop. We had heard rumblings about online shopping changing retail but were assured that customers want to try on clothes, the return process will be a nightmare and there was no need to worry, it was just a fad.
Jennifer Shaver, 3/3/2022
- JS7** Then 9/11 happened, and the very next day the tour busses were completely gone. Now we were left with our local shoppers, a lof of which were starting to try out online shopping. I watched a complete lack of reaction from the individual stores, from the Outlet management, everyone just continued to stare out the store front windows waiting for our tourists to return.
Jennifer Shaver, 3/3/2022
- JS8** The brands that have survived have online ordering platforms and the Outlet is still standing but has been a community college campus for some time.
Jennifer Shaver, 3/3/2022

Slide 6

- JS1** Site with same manager for last few years started losing occupancy and struggled to get new rentals, no obvious change had occurred. Site Audit was done, again no answer was discovered. The visit was during winter and it had become dark before I was wrapping up for the day. I leave the office and am walking out to my car when I look out into the property and it's pitch black down most of the aisles, over half the lights in the facility were out.
Jennifer Shaver, 3/3/2022
- JS2** Everything up to that point had concluded with things are in order here, I don't have an answer for the change in stats.
Jennifer Shaver, 3/3/2022

JS14

I JUST HAVE A SMALLER SITE, WE'RE NOT IN A BUSY MARKET, I DON'T NEED TO CHANGE

I think every site can benefit from implementing more technology into their operations and tenant experience. But the smaller sites in quieter markets, have the most to gain.

Payroll becomes such a burden and you're challenged with not having enough work to keep the manager engaged all day

Occupancy is established and how do you grow your revenue from here

You're doing fine against your competition, but what happens if their ownership or operations change



6

JS10

PAIN POINTS IN SELF STORAGE



- >> Lock Management: Lock Walks, Adding/Removing, Stocking Supplies, Human error
- >> Dangers and damage risk of Lien prep and customer assistance
- >> Restrict access but we can't entirely control or prevent all unauthorized access
- >> Gate Log's are not a full picture of facility behavior: tenant, manager & vendor traffic
- >> After-hours assistance, is my business only part-time solution
- >> We're an open book, every hasp is telling a story



JS14
JS10
JS11
JS12
JS13

7

Slide 7

- JS14** We've all been reminded through this pandemic about having to adapt for situations we we're prepared for. We had Noke Smart Entry installed at our facility 6 months prior to COVID hitting and we already had all the tools in place to operate remotely while our competitors were struggling to adapt

Jennifer Shaver, 3/3/2022

Slide 8

JS4 Jennifer Shaver, 3/3/2022

- JS9** The average store manager spends 6-10 hours a week on Lock Management. Adding management locks to vacant spaces, removing them once a rental is completed, adding overlocks to delinquent units, removing them individually after each payment, completing a lock walk to make sure the lock on the door matches the status of the account in your management software and checking for any signs of a break-in or move out

Jennifer Shaver, 3/3/2022

- JS11** Dangers and damage of completing Lien prep. Sent managers to Urgent Care because they got hurt using a power tool, more often than not it was damage done to hasp or door from the bolt cutters, grinder or drill. We replace the hasp after the lien sale but in the meantime, tenants come into the office to ask about the break in we must have had. Very time consuming process from 20 seconds to 20 minutes a lock.

Jennifer Shaver, 3/3/2022

- JS12** We have an idea of who might be onsite, but not the full picture. We know what unit's access code came through the gate, but not specifically who entered the code and what happened after the went through the gate

Jennifer Shaver, 3/3/2022

- JS13** Thief, Tenant or Competitor - every scenario of advertising your unit status is going to hurt you financially

Jennifer Shaver, 3/3/2022

JS10 Jennifer Shaver, 3/3/2022

ANSWER TO WHAT CUSTOMERS HAVE BEEN ASKING: CAN I TRUST YOU WITH MY STUFF?

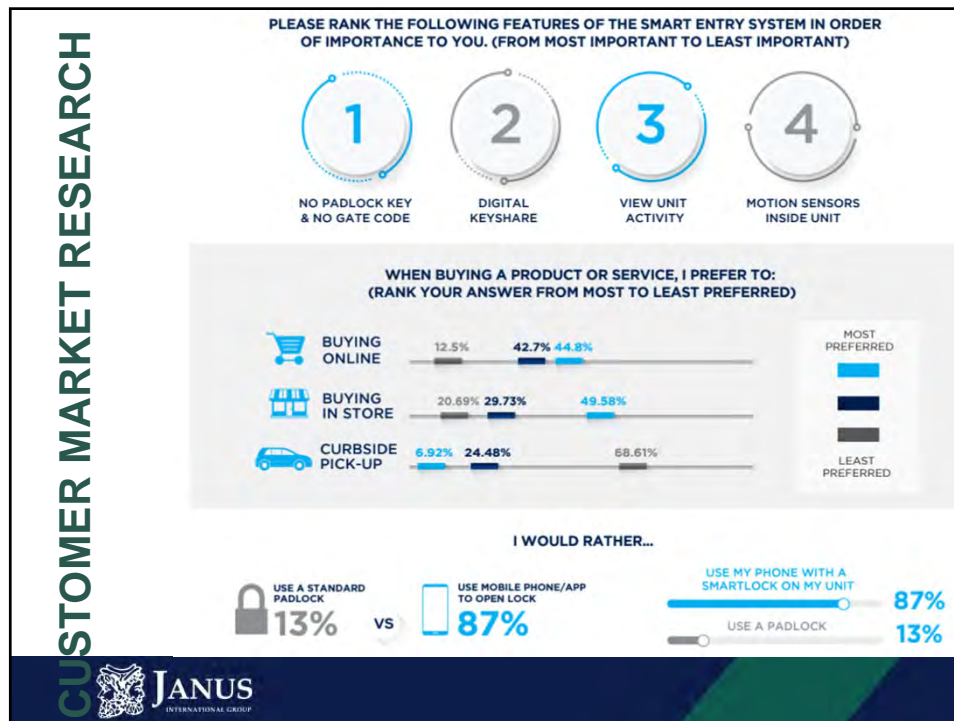


Tenants pick the cleanest facility that looks the most secure, they find a manager who appears to care about doing a good job, they buy a lock and hope that nothing bad happens, all while expecting storage to be a negative experience.

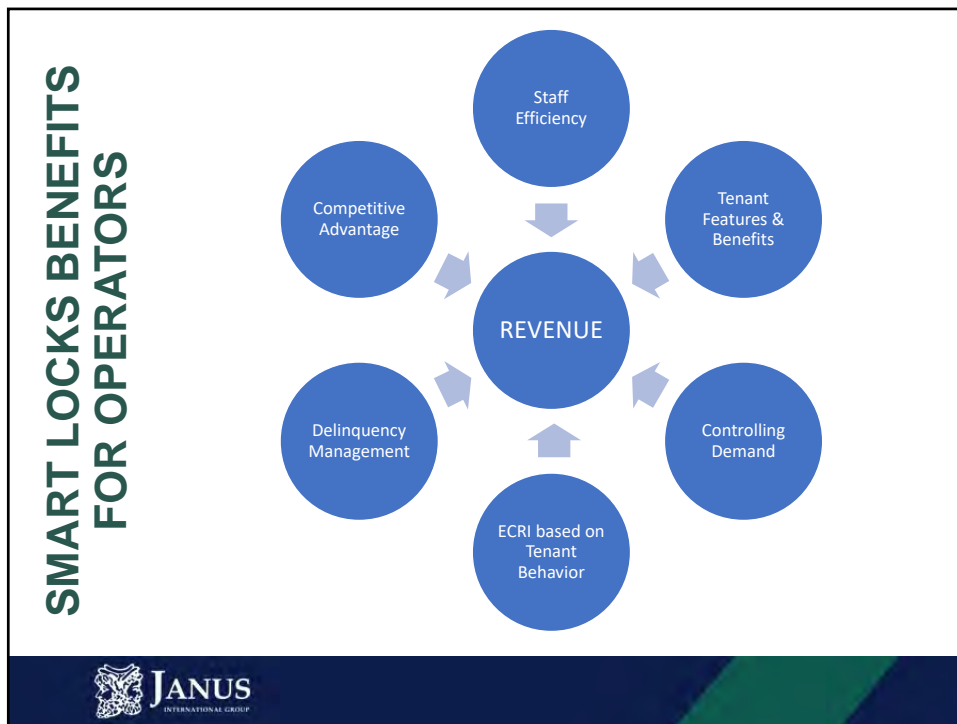
Customers value having visibility to monitor the custody of their belongings and modern conveniences that make their storage experience easy and enjoyable.



8



9



10

REVIEW

1. TECHNOLOGY ALLOWS FACILITIES TO CONDUCT BUSINESS IN A WAY THAT SUITS YOUR OPERATION GOALS
2. SOLUTIONS PROVIDED TO ADDRESS INEFFICIENCIES AND PAIN POINTS THROUGH TECHNOLOGY
3. PROVIDES CUSTOMERS WITH TOOLS TO ENGAGE WITH YOUR BUSINESS AND SERVICE IN WAYS THAT MIMIC THEIR EXPECTATIONS FROM OTHER INDUSTRIES
4. TECHNOLOGY CAN BE USED TO ADDRESS THE VULNERABILITIES OF SELF STORAGE SECURITY
5. BENEFITS OF ADAPTING TECHNOLOGY IN YOUR OPERATIONS AND TENANT FEATURES ALL LEAD TO NEW REVENUE OPPORTUNITIES

11

QUESTIONS?



Concurrent Educational Session

How to Develop a Successful RV & Boat Storage Facility

**PRESENTER: Robert Hayworth, Baja Construction
Co., Inc.**



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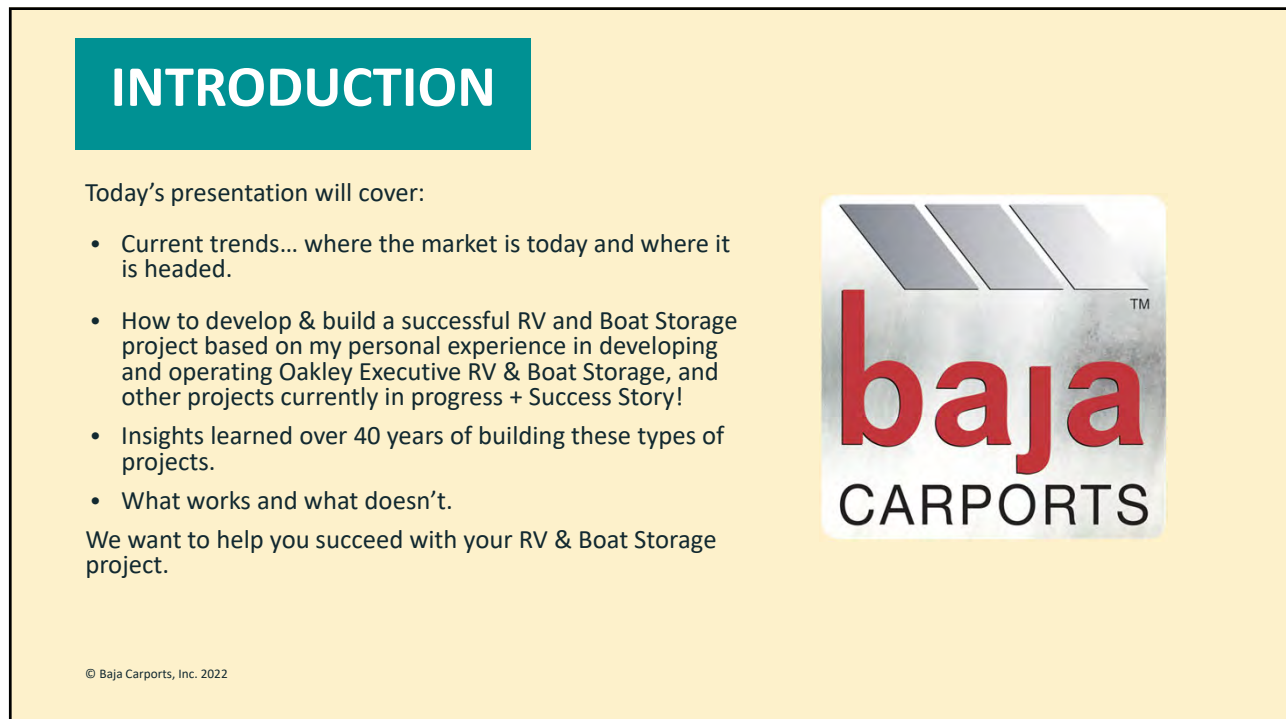
“EXPERIENCE IS KNOWLEDGE, EVERYTHING ELSE IS JUST INFORMATION”
Albert Einstein

HOW TO DEVELOP AND BUILD A SUCCESSFUL RV & BOAT STORAGE FACILITY
Presented by Robert Hayworth

MARCH 9–11, 2022 | **ROSEN SHINGLE CREEK**

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1



INTRODUCTION

Today's presentation will cover:

- Current trends... where the market is today and where it is headed.
- How to develop & build a successful RV and Boat Storage project based on my personal experience in developing and operating Oakley Executive RV & Boat Storage, and other projects currently in progress + Success Story!
- Insights learned over 40 years of building these types of projects.
- What works and what doesn't.

We want to help you succeed with your RV & Boat Storage project.

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2

THE RV CRAZE

- RV (Recreational Vehicle) industry is experiencing extremely high demand.
- One RV general manager in the Harrisburg area described the increase in sales last summer as **"astronomical."**
- To date, RV shipments show no signs of slowing.
- RV sales went from being tracked in months on the lot, to weeks on the lot... and now it's hours.
- The *Associated Press* reported yearly sales of motorhomes and camping trailers are at the highest production mark ever for the US, with nearly 560,000 units sold as of November 2021.

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3



Your New RV Storage Solution in Fort Myers & Southwest Florida

NOW OPEN RV Boat Storage Works offers Southwest Florida's newest, affordable covered and open storage for RVs, boats, autos, covered trailers or any vehicle you need to store and protect!



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4

Determining Land Criteria . . . Where to Build?



- **Zoning** – usually Light Industrial or any zoning designation that allows for outdoor vehicle storage.
- **Growth** – ideally near an area of growth or demographic expansion.
- **Visibility** – visible from a major thoroughfare with easy access for a large vehicle to maneuver.
- **Location** – may be further away from the city and is ideally located between where clients live and play... land is cheaper.
- **Size** – from 3 to 30 acres (or more) at a price of \$2 to \$5 per square foot.

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Zoning



Light Industrial
or any zoning
designation
that allows for
outdoor vehicle
storage.

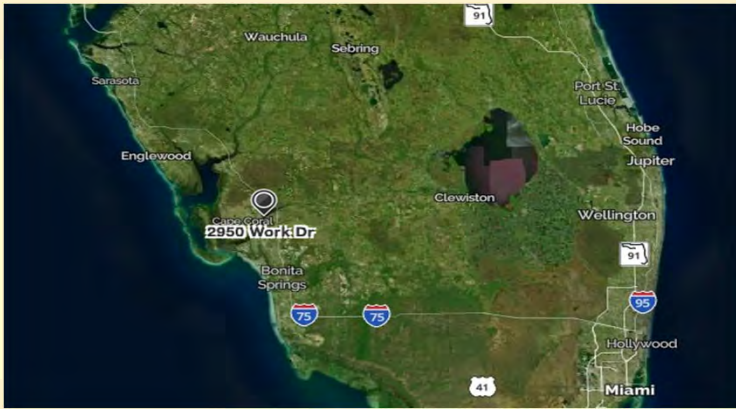
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Growth and Visibility



Ideally near
an area of
growth or
demographic
expansion.

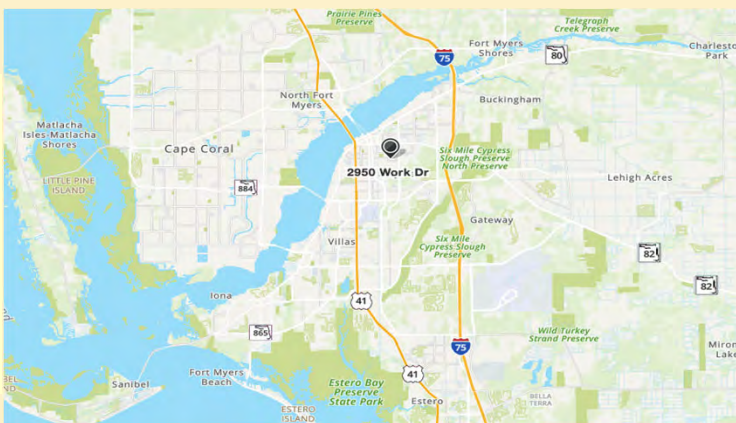
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Location



May be further
away from the
city and is ideally
located between
where clients live
and play.

Land is cheaper!

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Getting Through the Approval Process



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- **Governing body** – Do this first! Go to the governing body and get their input on the project.
- **Present the project** – Change their visual image! Show them a rendering or a visual aid to demonstrate your concept. This is not a gravel lot with a cyclone fence and razor wire.
- **Solar** – Add solar because everybody loves SOLAR. Plus, get better financing, a 26% tax credit, one-year accelerated depreciation, and an offset to your power bill.
- **Green light** - After getting the green light, hire an architect, a civil engineer, a surveyor, a soils engineer, and a landscape architect. Get a site layout from Baja Carports. Send Baja's layout to the architect and the civil, obtain a rendering, make a story board and present it to the City Council and Planning Department for approval.

9

How to Design and Build Your Facility . . . Including Amenities



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Engage Baja Construction!

We will work with the architects and surveyor to layout the RV storage facility including the Canopy layout, fencing, gates, office building (reception lobby, sales area, conference room, coffee bar, security cameras and displays, WiFi), exterior showers and bathrooms, propane supply, ice machine, dump station, trash, RV rinse area, 110 outlets, etc.



10



11



12

RV & Boat Storage by Baja Canopy Options



Without Solar



With Solar



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OAKLEY EXECUTIVE
RV & BOAT STORAGE

IN THE BLACK IN 18 DAYS!

Expansion makes 414 covered parking spaces!

Oakley Executive opened in the Summer of 2013. Built on 11 acres with more than 170,000 square feet of canopy parking designed, built and engineered by Baja Construction. The solar panels are the canopies' rooftops. The fully paved facility offers angled spaces, 24 hour video surveillance, computerized gated access, a 14-foot perimeter wall, dump station, propane station, and on-site fire hydrants. Tenant amenities include Wi-Fi and use of a conference room, and a bathroom with shower. The amenities and overall design - make it a Class A facility, and a first of its kind in the RV storage industry on the West Coast.

Oakley Executive's owner and founder of Baja Construction, Bob Hayworth purchased, installed, owns and operates the solar (photovoltaic) system at his business location in Oakley, California. The system's production created the extra cash flow and made his decision to expand "a no-brainer!"

Mr. Hayworth added 67 more solar covered spaces, approximately 1 MW of electricity to his existing 1.5 MW's. This is more power than the business operation will ever use. All the kilowatts produced are sold back to the utility on a 20 year fixed rate contract, called a Power Purchase Agreement (PPA) (time & rates differ per utility). Utilities can offer a "Feed-in Tariff" - a policy mechanism designed to accelerate investment in renewable energy technologies. The initial PPA created a bankable annuity used as income to secure financing. The power bought will be credited to California's Renewable Portfolio, which requires that total procurement of power from eligible renewable energy be at 33% by 2020.

SOLAR EXPANSION SUCCESS STORY!

Phase II's expansion is already being planned.

Today, the award-winning facility is a staple amongst its community and the Bay Area. The revenue generated from the electricity's feed-in tariff, thus far, have turned out to be far better than what Mr. Hayworth thought it would initially be going to be. His solar carport "rooftop" system is covering more than the recreational vehicles under them. It's covers his debt service! The business was cash flowing in the first 18 days! The first check from PG&E was for \$34,000. The payment to the bank was \$32,000. Reality is the business was cash flowing from day one of opening!

✓ Total Project Cost	\$10.7MM
Land SMM - Development SMM - Project Cost	\$3.2MM
✓ Loan	\$7.5MM
✓ Debt Service	\$32k/Month
✓ Solar Income	\$34k/18 Days
70% of Loan offset by Taxes Saved	
✓ Tax Credit (30%)	\$2.1MM
(Based on Solar Cost: \$3MM)	
✓ Tax Saved	\$3.2MM
(From Depreciation - Adj. Project Cost)	

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OAKLEY EXECUTIVE
RV & BOAT STORAGE

State-of-the-Art
RV and Boat
Storage

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OAKLEY EXECUTIVE
RV & BOAT STORAGE

State-of-the-Art
RV and Boat
Storage

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17



18



19



20



21

How to Manage the Facility and Overhead Costs



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- Onsite Staffing – I have (2) part-time managers working a total of 24 hours per week each.
- Professional Management – if needed
- Landscape maintenance – scheduled
- Maintenance contractor – on call
- Cleaning Service – scheduled
- Security and alarm monitoring service
- Comprehensive insurance
- Utilities
- Pest control
- Propane for resale to customers
- Property taxes
- Cloud based facility management software

22

Financing... What is Available Now?



- Standard Commercial Loan – 65% LTV
- SBA Loan Standard – 80% LTV with conditions
- SBA 504 (Go Green Loan) – 90% LTV with conditions
- Need developer experience or contractor with experience
- Must offset power usage
- Feasibility Study to demonstrate demand
- Owner's credit history
- Liquidity
- Access to cash or interest reserve
- Chose a contractor that is financially healthy... with at least 3 years of solid credit history
- My banker's suggestion "just hire Baja!"

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CASE STUDY – SUCCESS STORY



Designed and built by Prabh Sandu, CEO, Chairman and Founder at Paradise, LLC

- Land Purchased
– June 2019
- Project Started
– April 2020
- Opening Day
– July 25, 2021
- 6 Month Occupancy
– 60%

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CASE STUDY – THE INVESTMENT



Land: \$2.0M


+ Cost to Design & Build: \$4.4M


= Total Cash Needed: \$6.4M

- Owner Equity: \$1.8M

= Financing: \$4.6M
 SBA \$2.04M (2.25%)
 Bank \$2.56M (3.5%)

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CASE STUDY – THE OPERATION



INCOME

- Occupancy @ 3 days = 20%
- # of Spaces: 352
- Rentable Square Feet: 160,000
- Avg Monthly Rent PSF: \$0.53
- Avg Monthly Income: \$84,800

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CASE STUDY – THE OPERATION



Cost Per Month

Debt Service: \$21,800

Overhead

- Manager/Staff
- Security
- Accounting
- Bank Fees
- Maintenance
- Landscape
- Insurance
- Property Taxes
- Utilities

Total Overhead: \$19,100

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CASE STUDY – THE WIN!



Investment

- Owner Equity: \$1.8M

Value @ 12 Months

Pre-tax Income Net of Overhead:

- Per Month: \$55,927
- Per Year \$671,129

**Value (4.2% Cap Rate):
\$16.0M**

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THANK YOU!



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Concurrent Educational Session

Overcoming Employer Challenges

PRESENTER: Lisa Pyle, Real8 Group



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Employer Challenges

Where have all of the workers gone?
What can companies do to find, attract and retain employees?



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1

Welcome to the great employee shortage...



- 🔍 Wkhuh#v#bq#ryhuda#ofn#r#i#
txddilhg#fdgg lgdwhv/#qfoxglbj#
p lg#dgg#hqlru#byhndwlii
- 🔍 Frp sdqilhv#buh#j urz lqj #kuxxjk#
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- 🔍 tw#b#fdgg lgdwhv#p dunhw







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2

Why are candidates so hard to find?



- ✎ There are more jobs than candidates. Even LinkedIn is getting lower response rates. Job postings are not working.
- ✎ Other companies are looking for the same type of person.
- ✎ People are more reluctant to relocate than they have been in the past.
 - Limited supply of homes for sale
 - Very high housing costs
 - State government and Covid policies, mask mandates, schools (virtual / in-person learning) are impacting where people are willing to move to.
- ✎ Flexibility to work remotely.
- ✎ Compensation



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3

JOB POSTINGS –



- ✎ Mr#rdugv/DlnhgIq#D
qrw#v#nhfwyh1
- ✎ Txddilng#fdggjgdwv#qrw#
uhvsrqglj#r#re#
srwlgjv
- ✎ Frp sdqlhv#frp shwlgj#iru#
wh#vdp h#w/sh#r#
fdggjgdwv#v/p kdu#
rshgljv1



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OBJECTION TO RELOCATION



- Limited housing options
- High cost of housing
- State policies on mask mandates and restrictions
- Schools
- **Many companies are allowing candidates to work remotely**

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5

SHOW ME THE MONEY!



- High salary expectations
- Sign-on bonus / guaranteed bonuses
- Multiple offers
- Counter-offers



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6

WHAT CAN YOU DO?



BE FLEXIBLE

- Can this person work remotely?
- Can you be flexible in your requirements?
- Are you willing to train?
- Do they have grit? Common sense? Intelligence? Desire to learn and grow?

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7

How to address salary in a competitive market

• Know what the candidate is earning and/or salary expectations

Note - If you are in one of these states, you cannot ask a candidate what they are earning –

AL, CA, CO, CT, DE, HI, IL, ME, MD, MA, MO (Kansas City), NV, NJ, NY, OH (Cincy and Toledo), OR, PR, RI, VT, WA and Washington, DC. There are other bans in other States and Cities that apply to public agencies. It's a changing list so always check: <https://www.hrdive.com/news/salary-history-ban-states-list/516662/>

- When you can ask, ask the candidate “What is your current base salary?”
- Are they expecting a review, increase or bonus anytime soon?

- If you cannot ask about salary, “Can you give me an idea of what you are looking for from a base salary standpoint?”

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Compensation.....



- **Bonus**
 - What is their bonus potential, what is it based on and when is it paid?
How does this compare to your bonus program.
- **401(k) – matching?**
- **Medical Benefits – contribution towards premium**
 - Vision, Dental?
- **Vacation**
- **Car allowance or company vehicle?**
- **Life Insurance / Disability?**



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9

Preparing a competitive offer



- **Show them an increase in salary**
 - (We have been seeing increases of 15% - 39% in salary alone).
- **Ensure that all bonuses, benefits, vacation and perks are equal to or greater than current package**
- **Offer a sign-on bonus**
- **Support them through their notice period. Stay in touch. Allow them adequate time to wrap up, keep them excited about your position.**



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10

Important topics to cover...



- Is the candidate looking at any other opportunities?
- Do they feel they will receive a counter-offer?
 - If so – would they consider one? Is there anything their company could do to get them to stay?
- Know what is motivating the candidate to consider a job change.



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RELOCATION





- Offer a house hunting trip with spouse
- Allow them to work remotely until kids finish school or for 30/60/90 days
- Provide temporary housing or a temporary living allowance
- Get them excited about the area
- Provide them with information about schools if they have children

Be patient it may take some time to find a new home...





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Join us in this session for much more.



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“eTest is a cost-effective tool that helps us make better hiring decisions.

Our culture is to foster honesty, diligence, and excellence. Part of the way we achieve this is to ensure we have the right people in the right positions. eTest adds tremendous value by helping us to understand a candidate’s professional makeup as well as reducing employee turnover.”

Tim Springer

Vice President of Property Operations
Move It Storage



E-TEST

eTest is a web-based screening program that provides self storage owner-operators/hiring managers with real-time pre-employment testing and assessment services. SSA eTest is specially customized for evaluating potential self storage facility managers. It will provide a fast, reliable and cost-effective means of measuring common-sense traits linked to job behavior. Better hires result in reduced turnover and improved productivity by putting the right person in the right job. Learn more at selfstorage.org.



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Concurrent Educational Session

How a Labor Shortage Impacts Self Storage: Building an Effective Solution

PRESENTER: John Traver, XPS Solutions



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How A Labor Shortage Impacts Self Storage:

Building an Effective Solution

XPS SOLUTIONS
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1

Widespread...





In Rhode Island, restaurants are not the only businesses having a hard time finding workers

Manufacturing, health care, transportation, and other industries are struggling to fill jobs, a problem that could turn a post-pandemic economic boom into a bust

By Brian Amara | Globe Staff, Updated April 29, 2021, 6:00 a.m.

[f](#)
[t](#)
[in](#)
[v](#)



An employer advertised a help wanted sign on April 9 in Pawtucket, R.I. SPENCER PLATT/GETTY

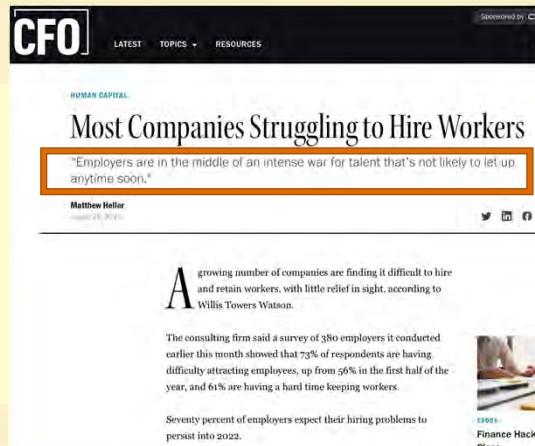
XPS SOLUTIONS



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2

The Struggle is REAL...



XPS SOLUTIONS



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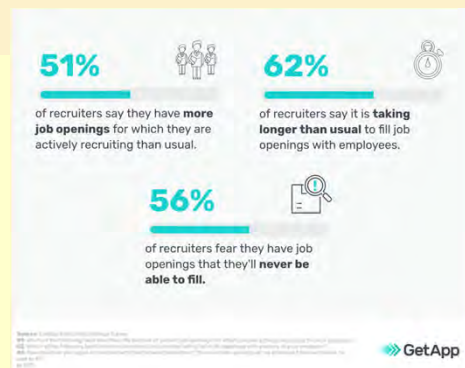
3

Recruiting Industry Statistics



Recruiters are revealing a tough outlook:

- 51% of say **MORE** Job Openings than normal
- 62% say it's taking **LONGER** than normal (can't find...)
- 56% admit they have positions they will **NEVER** fill



XPS SOLUTIONS

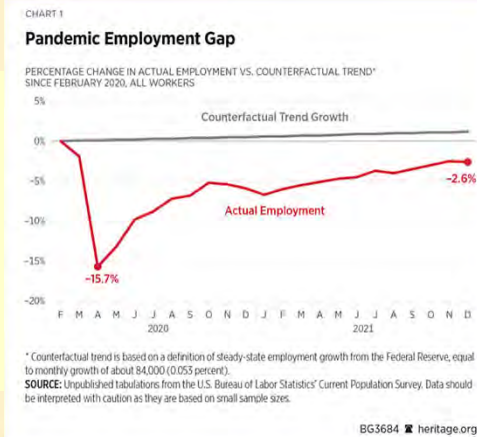


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4

Forecasting: Reading the Trend

- As of February 2022:
 - Labor Shortage... in the U.S. economy.
 - **Threatens economic growth**
 - **February 2022 Stats:**
 - @ 10.9M Job openings
 - Employment TODAY: 2.3M BELOW pre-pandemic levels (**1.4%**)
 - **And...we grow at a clip of 84,000 jobs per month**



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5

It Will Take Time...So Let's Not Wait...



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6

Self-Storage Is Feeling It Too

- At the Counter...
- On the phones...
- Everywhere...



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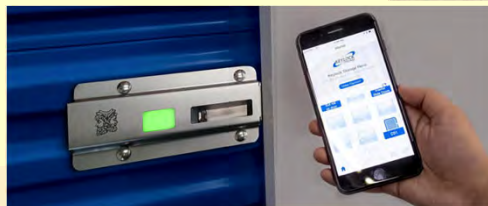


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7

Temptation: The "Knee Jerk" Reaction

- Tactics should always be a function of our ...STR__ _ G _
- Should you just go all High-Tech?
- All AI?
- All Touchless?



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Strategic Thinking...

- Consistently great organizations continually begin by “assessing what’s broke...”
- Green Bay Packers, Ron Wolf, 1991
 - It took 5 years and 3 months...
- “Happy are they *that can hear their destructions and put them to mending.*”
-Shakespeare



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Always Test the Value Proposition

- What got you here may not get you _____.....
- Next step: What does your Tenant expect/want?

10 Economic Factors That Affect Self-Storage Facility Value



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Your Value Proposition...



- 2 Navigational “Questions” every business must answer:

- **Is it necessary?**
 - Does it change a person's life/lifestyle?
- **Measure of Risk:** Will it last?
 - What's required for long-term success?



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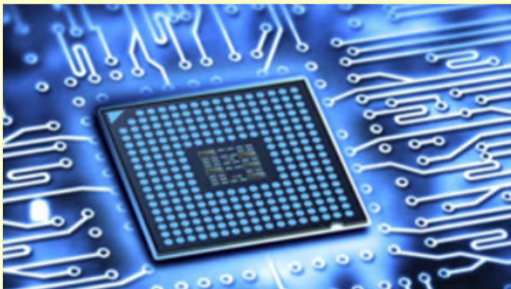
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11

Strategy In The Labor Crisis



- Your Best Formula: **High-TECH + High TOUCH**



+



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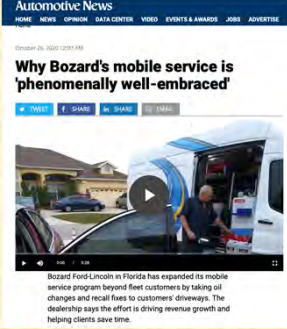
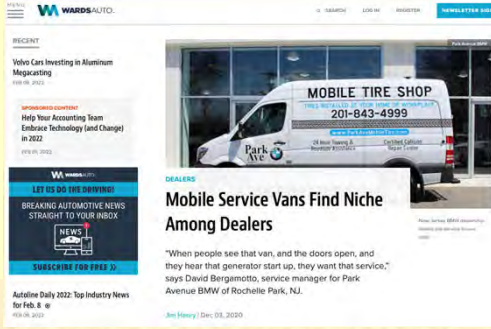
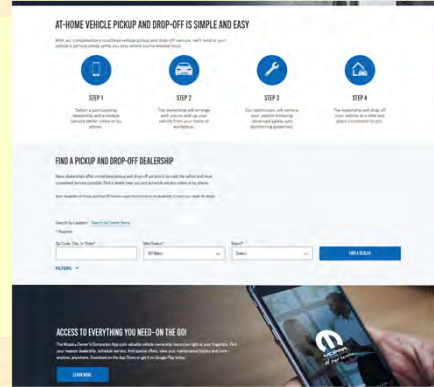
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Other Industries: Strategy In The Labor Crisis

• High-TECH + High TOUCH In Automotive...

Imitation is...

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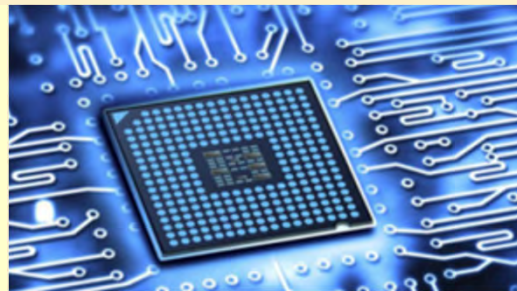
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Participate. Learn. Benefit. Succeed.

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HIGH TECH SOLUTIONS...

Excelling in Spite of
a Labor Shortage



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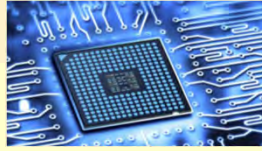
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Participate. Learn. Benefit. Succeed.

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Self-Storage Strategies For The Labor Crisis

• High TECH:



• Create a “Frictionless” Experience



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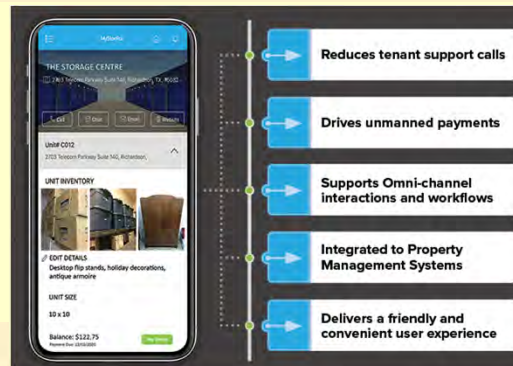
HIGH TECH SOLUTIONS



• Solution #1:

- “Frictionless”
 - Forgot my gate code
 - Make a payment
 - Add a user
 - Other notification

• Mobile App for Tenants



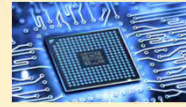
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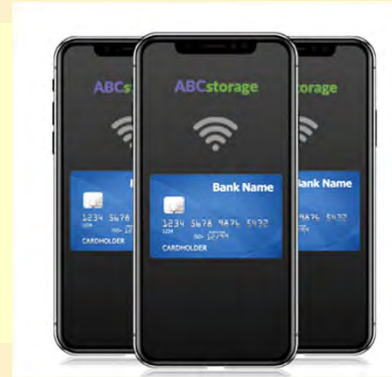
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HIGH TECH SOLUTIONS



• Solution #2:

- “Frictionless”
- **Make it EASY to Pay Rent**
 - AI/Automated Payment Features
 - Voice commands/IVR
 - Live Agent support for when needed



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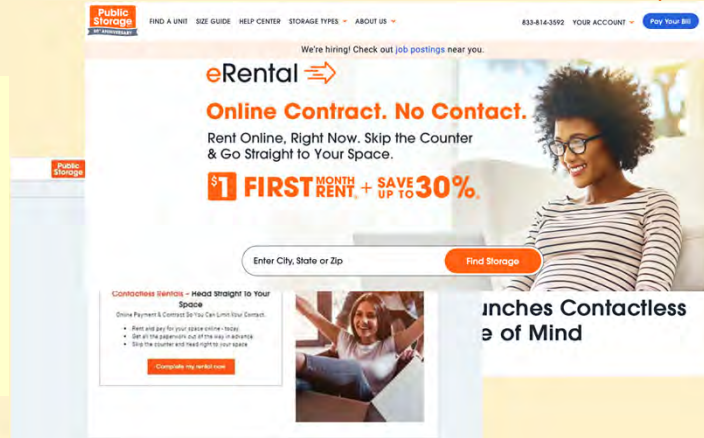
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HIGH TECH SOLUTIONS



• Solution #3:

- “Frictionless”
- **Contactless Rentals:**
 - Over the phone contracts
 - Gates
 - Locks



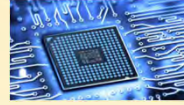
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HIGH TECH SOLUTIONS-RECAP



FRICTIONLESS EX

High TECH #1:

Mobile App for Tenants

High TECH #2:

Automated Payment Features

High TECH #3:

Contactless Rentals

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HIGH TOUCH SOLUTIONS...

Excelling in Spite of
a Labor Shortage



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HIGH TOUCH SOLUTIONS



• High TOUCH #1:

• **Re: New Direct Hires:**

- Market has never been stronger-**for workers!**
- Even though this is a Labor SUPPLY problem...
- **UPGRADE**-don't just replace...



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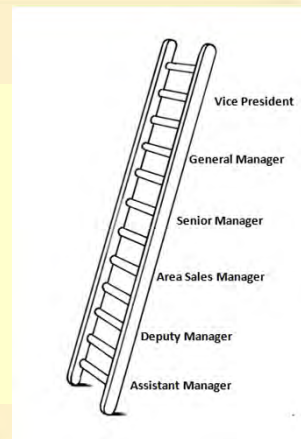
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HIGH TOUCH SOLUTIONS



• High TOUCH #2a:

- **Re:Your Current Staff...**
Career Path clarity!



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HIGH TOUCH SOLUTIONS



• High TOUCH #2b:

- **Re:Your Current Staff...**
Learning Path clarity!



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HIGH TOUCH SOLUTIONS



• High TOUCH #2c:

- **Re: Your Current Staff...**

- **Annual Achievement Compensation:**
 - For Retention
 - Based on Occupancy % avg. etc.
 - Great companies have staff that thinks and acts like OW__ R S...

WHAT IS INCENTIVE COMPENSATION?

WHAT

The additional variable pay that sales reps earn on top of their regular, base salary

WHY

Motivate and engage your sales reps and tell them what to do and how they can earn more money

HOW

Align incentives with goals to guide sellers to prioritize certain deals and how to best structure them

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HIGH TOUCH SOLUTIONS



- **Q:** What does the Tenant **CARE** about when they *call your property*?
- To connect with a live person...
- 3 Traits:
 - Helpful
 - Friendly
 - Kind
- A Contact Center will speed up overall responses... That's what the Tenant says they **CARE** about!
- It's NOT the Big that eat the small...
- It's the fast that...
- Your speed to their needs, helps overcome your competitor's size



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HIGH TOUCH SOLUTIONS



- **High TOUCH 3a:**
- **Re: Providing "Frictionless" Hours of Assistance:**
 - Augment coverage with a Self-Storage Call Center
 - Expand your COVERAGE
 - Expand your STAFF



Hours

Saturday	9AM-5:30PM
Sunday	Closed
Monday	9:30AM-6PM
Tuesday	9:30AM-6PM
Wednesday	9:30AM-6PM
Thursday	9:30AM-6PM
Friday	9:30AM-6PM

[Suggest new hours](#)

Access

Saturday	6AM-10PM
Sunday	6AM-10PM
Monday	6AM-10PM
Tuesday	6AM-10PM
Wednesday	6AM-10PM
Thursday	6AM-10PM
Friday	6AM-10PM

51 On Site "Manned" Hours/wk.

Only @ 45% "Manned"

112 "Access" Hours/wk.

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HIGH TOUCH SOLUTIONS



- Live Coverage Improves **Convenience** for the Tenant...
- If there is proper Integration to Property Management Systems:



- Integration allows for:
 - Real-time space mix & pricing views for rentals
 - Gate codes
 - Payment due info

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HIGH TOUCH SOLUTIONS



- High TOUCH 3b:
- A “Frictionless” Virtual Team via Self Storage Call Center Can:
 - Capture Rentals w/ Live Agents
 - Provide Tenant Support
 - Be your Labor Supply SOLUTION



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HIGH TOUCH SOLUTIONS



• High TOUCH 3c:

• **Virtual Team via Self Storage Call Center:**

- Consumers WIDELY ACCEPT this model (every REIT has one)
- Cost is very LOW compared to Direct
- Impact is MEASURABLE



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HIGH TOUCH SOLUTIONS-RECAP



High TOUCH #1:

Re: New Hires - Upgrade



High TOUCH #2:

Current Staff – Paths & Comp



High TOUCH #3:

Call Center = Extending Frictionless Sales & Support



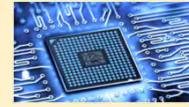
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A Winning Strategy...



FRictionLESS

HighTECH #1:

Mobile App for Tenants

HighTECH #2:

Automated Payment Features

HighTECH #3:

Contactless Rentals



HighTOUCH #1:

Re: New Hires - Upgrade



HighTOUCH #2:

Current Staff – Paths & Comp



HighTOUCH #3:

Call Center = Extending Frictionless Sales & Support

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Seeing The BIG Picture...



In 1998:

Larry Page & Sergey Brin wanted to back to school...
Yahoo! had the opportunity to buy Google for \$1M...
They decline though...
Price was "**too high**" and their OWN search engine at Yahoo! would be better.

Google!

yahoo!

In 2002:

Yahoo! Realizes their mistake and NOW offers \$3B for Google...
But...Google wants \$5B now...

In 2008:

Microsoft offers \$40B for Yahoo!...
Yahoo! declines...

Microsoft
YAHOO!

In 2016:

Yahoo! sells to Verizon for \$4.6B
Maybe that's why the Most...



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Contact The Presenter



John Traver


CEO


XPS Solutions

877.977.8721

Sales@XPSUSA.com

www.XPSUSA.com

@XPSSolutionsUSA 

IG: xpssolutions 



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LOOKING FOR NEW TALENT?

4 EASY STEPS TO HELP YOUR SEARCH

1

ONE-TIME REGISTRATION

Go to www.etest.net/ss-sign-up to register, then scroll to the bottom of the page and click the “Submit” button. An email will be sent within **one business day** with your log-in information, instructions and site link.

2

LOG IN & SET UP TEST

Go to www.etest.net and enter your login information. Click on “Create New Assessment” to **set up a test for your candidate**.

3

CANDIDATE TAKES TEST

It only takes 20-30 minutes!

Candidate can take the test in-house (proctored is preferred) or remotely from any location.

1

ONE-TIME REGISTRATION



2

LOG IN & SET UP TEST



How does
eTest®
work?

3

CANDIDATE TAKES TEST



4

GET SCORE



4

GET SCORE

Results are sent via email to owner-operator/hiring manager for more focused and effective interviews. Feedback is sent in an Interview Guide which consists of:

- Narrative description
- Suggested interview questions
- Scores placed on a good/bad fit facility manager scale



eTest.net



Administer eTest to Your First Candidate for Free

Please complete the form:

Name _____

Title _____

Company _____

Address _____

Address _____

City _____

State _____ Zip _____ Country _____

Email _____

Phone _____ Fax _____

Are you a Self Storage Association member? ☐ Yes ☐ No

If so, please provide your SSA member number _____

How did you hear of eTest?

☐ Postcard Mailing

☐ *SSA Magazine*

☐ SSA Conference & Trade Show

☐ SSA Website

☐ SSA Email Advertising

☐ Word of Mouth / Colleague

☐ Other _____

Concurrent Educational Session

The Best of Both Worlds
(Live & Online Auctions)

PRESENTERS: Tony Johnson, SelfStorageAuction.com
Jack Ballentine, Hammer Down Auctioning Company



The banner features a yellow background with a decorative border at the top and bottom. On the left, the SSA logo is displayed with the text "SELF STORAGE ASSOCIATION" and the tagline "Participate. Learn. Benefit. Succeed." Below this, the main title "SSA 2022 SPRING Conference & Trade Show" is written in large, bold, orange and brown letters. To the right of the title is a large, stylized palm tree. The central text reads "The Best of Both Worlds" in large blue and orange letters, followed by "How 2 Self-Storage Auction Worlds 'Online' and 'Live' have Merged." in black text. Below this, there are two logos: "Hammer Down Auctions, Inc. Powered by SelfStorageAuction.com" and "SELF STORAGE AUCTION.COM". At the bottom, a dark blue banner contains the website "SelfStorageAuction.com", the dates "MARCH 9-11, 2022", and the location "ROSEN SHINGLE CREEK".

SELF STORAGE ASSOCIATION
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Conference & Trade Show

The Best of Both Worlds
How 2 Self-Storage **Auction** Worlds
“**Online**” and “**Live**” have Merged.

 **Hammer Down Auctions, Inc.**
Powered by SelfStorageAuction.com

SELF STORAGE AUCTION.COM

SelfStorageAuction.com **MARCH 9-11, 2022** | **ROSEN SHINGLE CREEK**

**CHANGE IS INEVITABLE / EMBRACE
THE CHANGE OR GET LEFT BEHIND!**



3 LEVELS OF DEALING WITH CHANGE IN BUSINESS

1. ACCEPT THE CHANGE
2. EMBRACE THE CHANGE
3. BE A PIONEER AND MAKE THE CHANGE

SelfStorageAuction.com



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CHANGE IS INEVITABLE / EMBRACE
THE CHANGE OR GET LEFT BEHIND!



COMPANIES WHO DIDN'T AND FAILED

Kodak **NOKIA** **xerox**TM

HUMMER 

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**CHANGE IS INEVITABLE / EMBRACE
THE CHANGE OR GET LEFT BEHIND!**



**BE OPEN-MINDED HOW TECHNOLOGY IMPROVES
PROCESSES AND CREATES OPERATIONAL EFFICIENCIES**



SelfStorageAuction.com



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CHANGE IS INEVITABLE / EMBRACE
THE CHANGE OR GET LEFT BEHIND!



MERGING SERVICES AND “KNOW-HOW” FROM
LIVE AUCTION COMPANIES CREATES SYNERGIES



BENEFIT SELF STORAGE OPERATORS

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MERGING THESE SERVICES CREATES SYNERGY AND PROVIDES VALUE TO THE SELF-STORAGE OPERATOR.

SERVICES OFFERED BY TRADITIONAL “LIVE” AUCTION COMPANIES:

- Lock-Cuts / Inventories / Pics
- Records & Lien Searches
- Unit File Reviews
- Consultations
- Create Auction Schedules
- Direct Contact with Bidders

SERVICES OFFERED BY “ONLINE” AUCTION COMPANIES:

- Large Bidder Base
- API Integrations / Reporting
- Ability to Market Auctions
- Excellent Customer Support
- Flexible Pricing Models
- User Friendly Platform

SelfStorageAuction.com



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CLOSING GENERAL SESSION

Live from Orlando: The Self Storage Legal Network's Legal Power Hour

*Presenters: Carlos Kaslow & Scott Zucker
Self Storage Legal Network*





SSA 2022 SPRING
Conference & Trade Show

The Self Storage Legal Network's
"Legal Power Hour"

Carlos Kaslow, Esq.
Scott Zucker, Esq.
www.selfstoragelaw.com

SELF STORAGE
LEGAL NETWORK

Self Storage Legal Network **MARCH 9–11, 2022** | **ROSEN SHINGLE CREEK**

1



NEW LEGISLATIVE DEVELOPMENTS

- More state authorize email lien notices
- More states ditch or limit newspaper advertising
- More states embrace towing of vehicles
- More state encourage online lien sales

Self Storage Legal Network **SSA 2022 SPRING CONFERENCE & TRADE SHOW**
MARCH 9–11, 2022 | **ROSEN SHINGLE CREEK**

2

Litigation!



- Website Litigation
 - New wrinkle in website accessibility - *Contreras v. Clutter, Inc.* filed in NY District Court
 - Website Wiretapping Claims -Lawsuits filed primarily in FL – Storage operators have been sued
- PS Wins \$100 million tenant insurance class action (Perez V. PS)
 - Insurance requirement okay and failure to enforce not deceptive
- U. S. Supreme Court expands property owner protections
 - An end to administrative limbo - *Pakdel v. City and County of San Francisco*, 141 S. Ct. 2226
 - Lowering the bar on governmental taking- *Cedar Point Nursery v. Hassid*, 141 S. Ct. 2063

Self Storage Legal Network



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3

LEGAL "POWER HOUR"



QUESTIONS & ANSWERS

**TAKE THIS OPPORTUNITY TO GET YOUR
 SELF STORAGE QUESTIONS ANSWERED!**

Self Storage Legal Network



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4

LEGAL "POWER HOUR"



THANK YOU!

Join the Network



*More information on the
Self Storage Legal Network at:
www.selfstoragelaw.com*

Self Storage Legal Network



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The Self Storage Legal Network

The Self Storage Association is pleased to provide SSA members exclusive access to the legal hotline services of the Self Storage Legal Network (SSLN). The SSLN is available only to SSA members and is one of the best sources available for obtaining industry-related legal information.

The Attorneys

Attorneys D. Carlos Kaslow and Scott Zucker, whose combined experience in the self storage industry exceeds 50 years, operate the SSLN. Kaslow co-wrote the authoritative book on drafting self storage agreements; *SSA's Rental Agreement Handbook* and Zucker authored *Legal Topics in Self Storage*. Our attorneys also co-write annotated lien law booklets for each state. They understand the self storage business and believe there is a better way to provide you with quick access to the specialized legal information you need.

How the SSLN Subscription Works

Annual subscription rates for the SSLN begin at \$575 yearly for operators running up to two facilities. If you run three to five locations, the annual subscription is \$850. If you have ten facilities the annual subscription is \$1,100 plus \$80 for each facility in excess of ten.

As an SSLN member subscriber, when you or one of your authorized employees has a question concerning

self storage operations, you simply log onto the SSLN online site and ask your question. The SSLN is staffed from 8 a.m. to 5 p.m. Monday through Friday and will provide a response to your inquiries by the next business day. They will thoroughly discuss your questions and there is no limit on the number of questions you can ask. You may also call or fax your question. That information will be sent to you upon joining the SSLN.

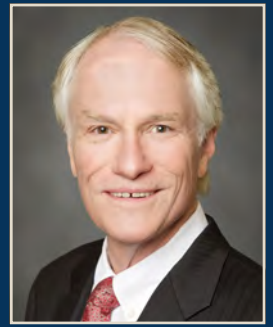
How many times have you had a question about lien laws or rental agreements or partial payments? Almost every decision you make regarding these self storage issues will have legal repercussions if the improper course is followed. With the SSLN, you can run your questions past an expert before making a decision.

If you would like to take advantage of this service, simply fill out the member subscription application, and return it with payment. You may not be able to employ a legal department, but you can have unlimited access to one of the world's most recognized knowledge centers on self storage law.

The SSLN is a legal and operations information service and does not provide subscribers with legal services.

You must be a dues paying Direct Member of the SSA to participate.

For more information on the SSLN, please call the SSA at (703) 575-8000.



Carlos Kaslow



Scott Zucker

"After more than 25 years in the self storage business, we still depend on the SSLN for guidance on legal and various other issues. Having access to the expertise of the legal team and the knowledge base of other self storage operators is invaluable to us. The convenience and low cost of having SSLN quickly answer our legal questions is a great investment for our small business and we highly recommend their services."

Patricia Wrinkle
Owner

Pisgah Center Self Storage

The #1 benefit of being a Direct SSA Member is access to the Self Storage Legal Network.

Are you taking advantage of this money-saving SSA benefit?

SSLN Application



Company Name _____ SSA Member # _____

Street Address _____ City, State & Zip _____

Telephone _____ Fax _____

E-mail Address _____ Primary Contact Person _____

Number of facilities owned/operated _____ Number of states in which you operate SS Facilities _____

Description of the Service: The Self Storage Legal Network will provide, on an annual subscription basis, a quick response self storage operations information service to subscribers. The service consists of specialized legal and operations information relevant to self storage operations. The Self Storage Legal Network will only provide service to subscribers. Subscribers will have unlimited telephone access to the service. The Self Storage Legal Network does not provide legal services to its members. Read the disclaimer carefully.

SSLN Subscriber Service Guarantee: The principals of the SSLN will provide a response to all subscriber inquiries within two business days of receipt of each inquiry. Upon receipt of application and payment, you will receive an SSLN hotline pass code for identification as a member subscriber when making inquiries.

Annual Subscription Dues

# of Facilities	Amount
1 – 2 facilities	\$575
3 – 5 facilities	\$850
6 – 10 facilities	\$1,100
11+ facilities	\$1,100 plus \$80 per site over 10

Member Classification _____ Amount: \$ _____

Payment Method

☐ Check (payable to SSA)

☐ Credit Card: ☐ Visa ☐ MasterCard ☐ AmEx

Credit Card Number: _____

Exp. Date _____

CVV (CC Security Code) _____

Billing Address _____

Signature _____

Address of primary self storage facility to receive SSLN service ☐ Same as above If different from above, please fill in:

Facility Name _____

Street Address _____ City, State & Zip _____

Telephone _____ Fax _____

Names of Authorized SSLN Users _____

Additional Facilities Included in subscription membership:

Facility Address	Facility Address	Facility Address
2)	5)	8)
3)	6)	9)
4)	7)	10)

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'Zap-It' Chalk & Grime Buster

- Easily Clean Off Chalk, Grease and Grime
- Leaves Doors Looking Clean & Refreshed



Chalky Door Before Using 'Zap-It'

Chalky Door After Using 'Zap-It'

* results depend on level of oxidation

Zap-It Chalk & Grime Buster For Refinishing Roll-Up Doors

- Removes chalk, grease & grime*
- Prepares doors for refinishing*
- Easily applied with basic tools
- 1 gallon does up to 10 doors

*Using 'Zap-It' on very badly weathered or heavily oxidized surfaces may remove paint down to the metal and require repainting.

Application of a "clear coat" may be required to restore protection and shine after using "Zap-It" on badly weathered surfaces.



Removes Chalk in 3 Easy Steps!



Spray On

Brush In

Rinse Off

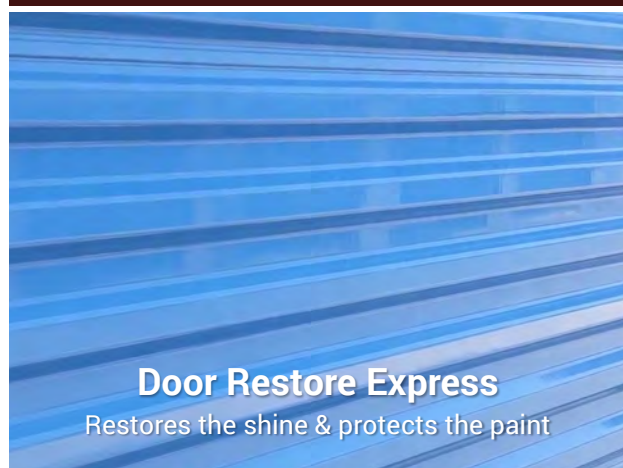
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CLOSE



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CLOSED
TRANSACTIONS



400⁺

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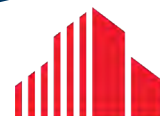
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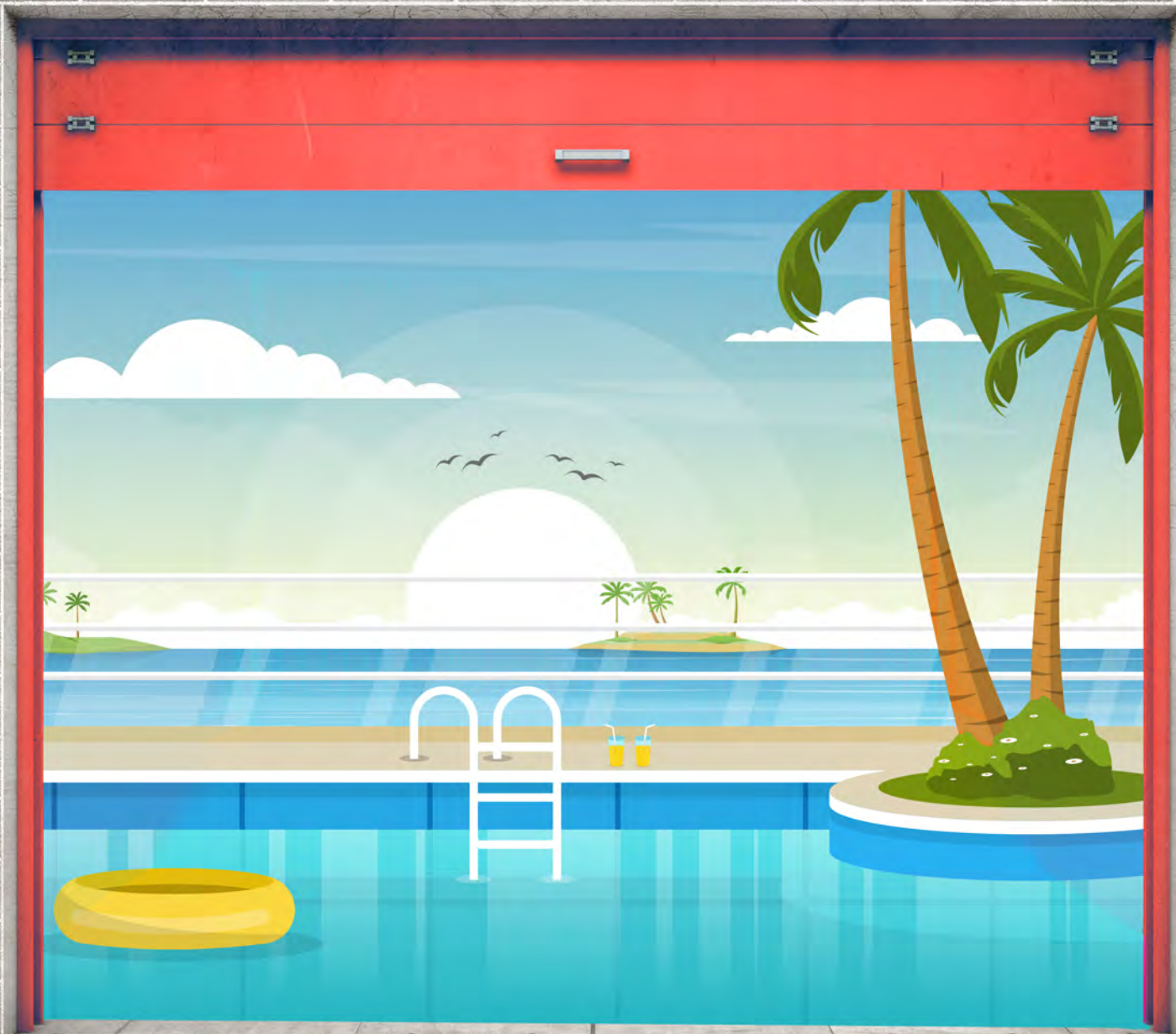
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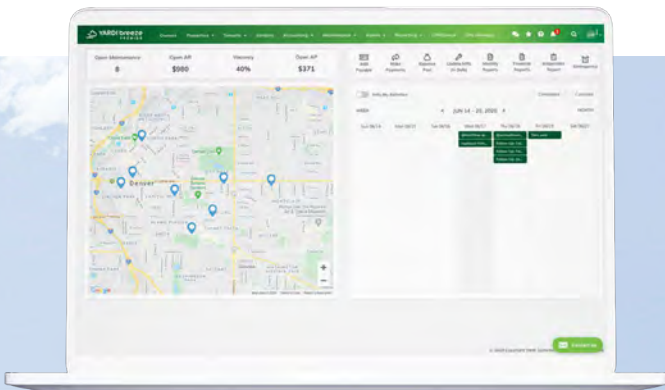


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