

2020

5X5 Training Manual



Absolute Storage Management
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Section One – ASM and You

ORGANIZATIONAL CULTURE

The founding partners of Absolute Storage Management, combined, have over 30 years of experience in the self-storage industry.

Our purpose:

ASM was formed to provide self-storage owners with professional management and consulting services.

Our mission:

Growing successful partnerships with our customers, team members and investors by delivering excellence in service.

Our values:

Leadership, Integrity, Communication, Teamwork, Excellence, Dedication

Our culture:

The culture at ASM is relaxed, yet hard working. We hope that our team members will enjoy themselves while performing their daily duties. We encourage our management personnel to adopt a “whatever it takes” attitude. We encourage INNOVATION and ORIGINAL IDEAS. It is acceptable to respectively challenge your superiors. We encourage learning and growth. The organization is made up of its people and cannot grow if its people are stagnant.

We have three customers; our tenants, team members, and owners. Job openings are filled from within the organization whenever possible.

We will be fair in all situations, yet consistent and firm in rules, regulations, and collections.

JOB RELATIONSHIPS

Property owners depend on ASM to oversee the operations of their storage facilities. The owners convey their wishes to the ASM supervisor, who then instructs the property manager. Some owners rarely visit a property, while others will visit frequently. Some owners deal exclusively with ASM supervisors, others may, at times, express their wishes to property personnel. The property owner has the final decision in all matters and his wishes are not to be taken lightly, however, you should always advise your supervisor before proceeding, if possible. If it is not possible to contact your supervisor before proceeding, you should advise him as soon as possible after complying with the owner's wishes.

ASM supervisors depend on property managers to direct the operations of the storage facility. The property supervisor visits each of his/her facilities periodically. ASM supervisors report directly to the owners monthly or more often if needed. Supervisors include Senior Regional Managers, Regional Managers, District Managers, and Senior General Managers.

Support Personnel work with ASM supervisors to assist with tasks such as payroll, payment of invoices, petty cash, etc. Managers and assistant managers may talk frequently with support personnel to clarify details involving invoices, timesheets, receipts, etc. Support personnel include Executive Assistants, Payroll and Orientation Specialists, Accounting Assistants, Marketing Success Managers, Social Media Coordinator, Insurance Analyst, and Auction Specialist.

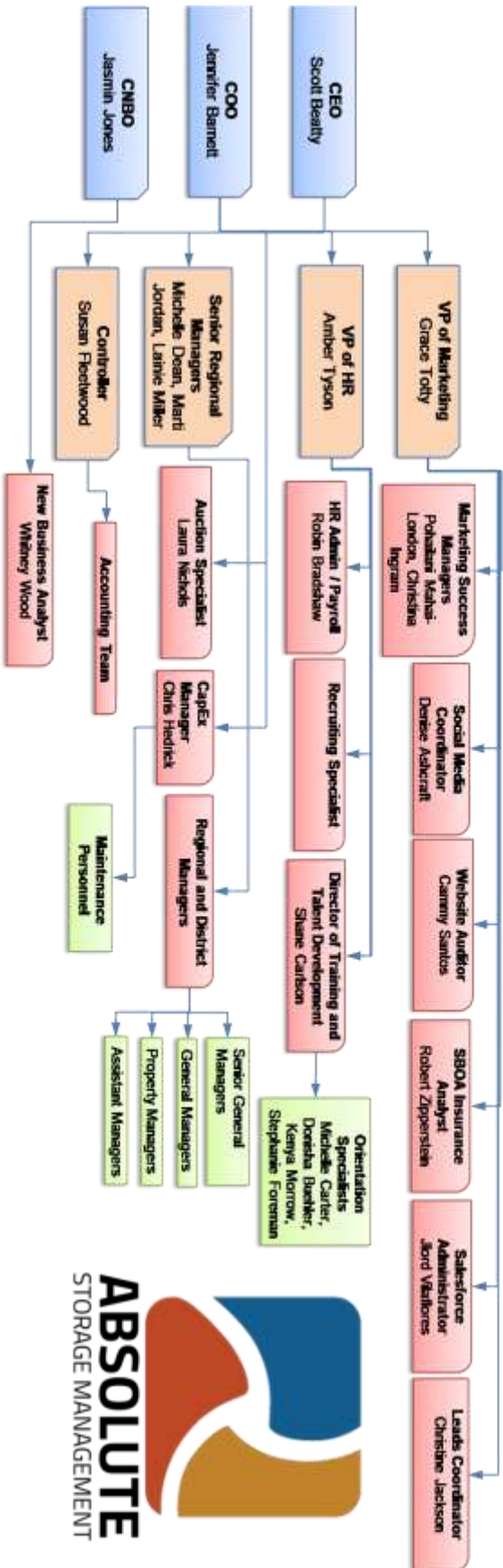
Property Managers are responsible for the daily operations of each facility. Duties include, but are not limited to; sales, marketing, customer relations, financial responsibility, and maintenance, assisting the supervisor in the hiring process, leadership, supervision and training. The property manager reports as often as necessary to the ASM supervisor, but not less than weekly.

Assistant Managers report to the property manager, and usually have a standard set of assigned tasks. Duties include, but are not limited to; sales, marketing, customer relations, financial responsibility and maintenance. Responsibilities of this position will increase with experience and training. Assistant managers work closely with property managers daily.



Maintenance Personnel are utilized at some facilities on a part time or full-time basis, depending on the level of maintenance needs and the desire of the property owner. Maintenance personnel are supervised by the property manager. Duties include but are not limited to; minor repairs and preventive maintenance.

Additionally, there are others that all personnel will work with occasionally, such as vendors, delivery personnel, contractors, etc.



COMMUNICATIONS

E-mail is the preferred method of communication between property personnel and supervisors. ASM supervisors spend a great deal of time meeting with property personnel, owners, and potential clients, therefore, traveling. It is not always convenient for them to take phone calls. However, they do check their e-mail several times a day and try to respond within 24 hours, but the most urgent matters will be addressed first. It is essential that you check your e-mail several times a day as well. The tone should be professional, and the content should be work related. In the event of a legal matter e-mail communications could possibly become public record.

When opening emails at a property, remember whoever opens the email needs to act regarding the contents of the email.

Please remember to not respond to emails while not clocked in.

Microsoft Teams should also be used as a primary method of communication between team members and supervisors. There are boards with specific subject matter for questions, and the ability to chat with individuals directly.

Phone Calls and Texting should be used appropriately when regarding subject matter of a business nature. Phone calls should be used for more urgent matters and when needing to call out of work. Texting should only be used for non-important matters. Personal phone calls, texting, and phone usage should only be completed during breaks.

If you receive an after-hours emergency call, please make sure to clock in for any time spent on the call, and for the action required after.

Communication is one of ASM's Core Values, and excellent communication is vital to our company's success! Below are guidelines that have been determined for the appropriate amount of communication from a supervisor (SGM, DM, RM, SRM). These guidelines are focused on a supervisor's communication with the property owners, property team members, coworkers, supervisors and home



office personnel. Communication levels are based on types of properties and owners. High standards of communication are also expected when dealing with vendors, customers, etc. Consult with your supervisor to determine what color/level of communication applies to your property.

- Green level: 3 communications per month
 - o Can be either call or e-mail
 - o Once a month should be a call
 - o In-person visit every 8 weeks; Virtual visit in between
 - o All correspondences from property should be addressed within 24 business hours

- Yellow level: 4 communications per month
 - o At least two of the communications should be a call
 - o In-person visits every 6 weeks; Virtual visit in between
 - o All correspondences from property should be addressed within 24 business hours

- Red level: 2 communications per week
 - o At least 1 call per week
 - o In-person visit every 4 weeks
 - o All correspondences from property should be addressed within 24 business hours

Items to discuss during property communication:

- Revenue – what impacted
- Rentals – what impacted
- Vacates– what impacted
- Net gain or loss
- Maintenance update- completed or upcoming
- Tenant rate increases- what is done for the month
- Unit occupancy and SQ ft occupancy
- Special circumstances: Evictions
- If ARs are high- auction update



- YOY gain if noteworthy
- Personnel
- Retail details- sales, how the month has been

Team Member Classifications

Full-Time Team Members - Team members who regularly work at least 30 hours per week who were not hired on a short-term basis.

Part-Time Team Members - Team members who regularly work fewer than 30 hours per week who were not hired on a short-term basis.

In addition to the above classifications, team members are categorized as either "**exempt**" or "**non-exempt**" for purposes of federal and state wage and hour laws. Team members classified as exempt do not receive overtime pay; they generally receive the same weekly salary regardless of hours worked. Such salary may be paid less frequently than weekly. The team member will be informed of these classifications upon hire and informed of any subsequent changes to the classifications.

Trial Period

The first three months of employment is an introductory period. This is an opportunity for ASM to evaluate performance. During this time, we will ensure that the core values of the new hire align with the core values of ASM. It also is an opportunity for the team member to decide whether he or she is happy being employed by ASM. ASM may extend the introductory period if it desires. Completion of the introductory period does not alter a team member's at-will status.

Your Employment Records

To obtain their position, team members provided us with personal information, such as address and telephone number. This information is contained in the team member's personnel file. The team member should keep his or her personnel file up to date by informing their Supervisor of any changes. The team member also should inform the Supervisor of any specialized training or skills he or she may acquire in the future, as well as any changes to any required visas. Unreported changes of address, marital status, etc. can affect withholding tax and benefit coverage. Further, an "out of date" emergency contact or an inability to reach the



team member in a crisis could cause a severe health or safety risk or other significant problem. Changes to team members' personal information such as address, W-4, direct deposit, etc. can be made online by visiting the AlphaSource employee portal at www.alphastaff.com and selecting the Employee Login option. Your team member files have restricted access. If you wish to review your hard copy personnel file, you must do so in the presence of management or designee. You may review your personnel file by making a written request to management. The written request will become a permanent part of your file.

No physical copies should be kept on site at any property.

Working Hours and Schedule

The property is normally open from 8:30am until 5:00 or 6:00pm. The property hours will vary from property to property. If you are uncertain of the property hours, please check with your supervisor. Additionally, the days of the week that properties are open may also vary from property to property, including being open on Sundays and holidays.

There might be times where office hours are changed. The goal of setting our office hours is to accommodate the greatest number of customers. Any permanent change in office hours must first be approved by your supervisor. Since we are a business which posts office hours, we are expected by the general public to be available during the posted hours. While there are times that we must be away from the property (i.e. bank deposit, marketing, purchasing supplies, etc.), we need to be there at all other posted times, and ensure there is property coverage while one team member is away. We should also minimize the time we are away from the office by combining trips (i.e. bank deposit and purchasing supplies). We all know that there is nothing more frustrating than driving up to a place of business that should be open and is not. This can cause us to lose customers, something we rarely want to do.

Your supervisor will make any decisions on whether to close early or to change property hours.

If working on the property with no extra coverage, ensure that you come back to the office every 15 minutes to check for missed calls and emails.

Abuse of the policy above may result in progressive discipline up to and including immediate termination.

Team member Dress and Personal Appearance

It is our desire to present a professional image to our customers, owners and to the public. Therefore, team members are expected to arrive to work clean, well-groomed and appropriately dressed for their position at ASM.

Our goal is to allow team members to wear clothes that are comfortable, while maintaining a professional appearance.

The following dress is required by ASM position:

The daily uniform of the Assistant Manager and Property Manager is:

- Slacks – navy, grey, black or khaki in color
- Skirts/shorts or capris – navy, grey, black or khaki in color skirts/shorts should be of an appropriate length (not shorter than fingertip length)
- Company-logo polo, oxford, knit or golf shirt.
- Solid property color polo with approved property logo name tag
- Company-logo t-shirts may be allowed only on supervisor-approved days
- Closed toe shoes – athletic, tennis, boating, loafers or deck shoes. Shoes should be in good condition and of a basic/neutral color

Please refer to the ASM Handbook for all specific dress code requirements.

Failure to adhere to the dress code policy can result in termination. If you have a question about whether a certain article of clothing should be worn, please ask your supervisor.

Personal and Company-Provided Portable Communication Devices

ASM-provided portable communication devices (PCDs), including cell phones and personal digital assistants, should be used primarily for business purposes. Team members have no reasonable expectation of privacy regarding the use of such devices, and all use is subject to monitoring, to the maximum extent permitted by applicable law. This includes as permitted the right to monitor personal communications as necessary.

Some team members may be authorized to use their own PCD for business purposes. These team members should work with the IT department to configure their PCD for business use. Communications sent via a personal PCD also may



subject to monitoring if sent through ASM's networks and the PCD must be provided for inspection and review upon request.

All conversations, text messages and e-mails must be professional. When sending a text message or using a PCD for business purposes, whether it is an ASM-provided or personal device, team members must comply with applicable ASM guidelines, including policies on sexual harassment, discrimination, conduct, confidentiality, equipment use and operation of vehicles. Using an ASM-issued PCD to send or receive personal text messages is prohibited always and personal use during working hours should be limited to emergency situations.

If a team member who uses a personal PCD for business resigns or is discharged, the team member will be required to submit the device to the IT department for resetting on or before his or her last day of work. At that time, the IT department will reset and remove all information from the device, including but not limited to, ASM information and personal data (such as contacts, e-mails and photographs). The IT department will make efforts to provide team members with the personal data in another form (e.g., on a disk) to the extent practicable; however, the team member may lose some or all personal data saved on the device.

Team members may not use their personal PCD for business unless they agree to submit the device to the IT department on or before their last day of work for resetting and removal of ASM information. This is the only way currently possible to ensure that all ASM information is removed from the device at the time of termination. The removal of ASM information is crucial to ensure compliance with ASM's confidentiality and proprietary information policies and objectives.

Please note that whether team members use their personal PCD or an ASM-issued device, ASM's electronic communications policies, including but not limited to, proper use of communications and computer systems, remain in effect.

Portable Communication Device Use While Driving

Team members who drive on ASM business must abide by all state or local laws prohibiting or limiting PCD (cell phone or personal digital assistant) use while driving. Further, even if usage is permitted, team members may choose to refrain from using any PCD while driving. "Use" includes, but is not limited to, talking or listening to another person or sending an electronic or text message via the PCD. Regardless of the circumstances, including slow or stopped traffic, if any use is permitted while driving, team members should proceed to a safe location off the road and safely stop the vehicle before placing or accepting a call. If acceptance of



a call is necessary while the team member is driving, and permitted by law, the team member must use a hands-free option and advise the caller that he/she is unable to speak at that time and will return the call shortly.

Under no circumstances should team members feel that they need to place themselves at risk to fulfill business needs.

Since this policy does not require any team member to use a cell phone while driving, team members who are charged with traffic violations resulting from the use of their PCDs while driving will be solely responsible for all liabilities that result from such actions.

Texting and e-mailing while driving is prohibited in all circumstances.

Personal Visits and Telephone Calls

Disruptions during work time can lead to errors and delays. Therefore, we ask that personal telephone calls only be completed during breaks as well as the use of personal email and text messaging. Personal communication should be made or received after working time, or during lunch or break time. This includes the use of a personal cell phone and texting.

For safety and security reasons, team members are prohibited from having personal guests visit our facilities or accompanying the team member while off site working. Anytime our team members are on the clock, they should not be engaging in any personal matters or business. We do not allow children to accompany team members to work at ASM properties. Team members are expected to make childcare arrangements ahead of time. Failure to adhere to this policy may result in disciplinary action up to and including separation.



Section 2 – Operations

ADMINISTRATIVE DUTIES

Your **primary** duties will always be to greet the potential customer, show units, rent units, take payments, and provide a high level of customer service. Always take care of customers first.

Some properties offer rental trucks to the general public. You will be trained in this procedure by your immediate supervisor or an ASM trainer if you are required to perform this duty.

Your **secondary** duties include checking mail, messages, e-mail, posting payments, making bank deposits, lock checks, cleaning out vacant units, placing and removing overlocks, cleaning of office and grounds, etc.

DAILY TASKS (not listed in any order)

1. Opening Lock Action Report completed, work orders completed/cleared and confirmed by 12pm.
2. Open Emails (review and respond to Echo Alerts)
3. Clean Office from debris, bugs, etc.
4. Clean CC Building from debris, bugs, etc.
5. Clean Property from debris, bugs, etc.
6. Remove locks from Delinquent Units immediately after payment.
7. Call **ALL** tenants going delinquent on the next business day.
NOTE: If you do NOT notate the account the call DID NOT OCCUR.
8. Bank Deposit - Deposit Slips attached to corresponding deposits for previous business day.
9. Clean Move-Outs when they are moved out.
10. Log into U-Haul/Penske to check reservations



WEEKLY TASKS: (may vary depending on specific property)

Monday – Thorough Walk-Thru completed and signed, Weekly Touch Basis Report. Contact delinquent tenants and notate their account for reference. Participate in Teams. Check reservations.

Tuesday – Contact delinquent tenants and notate their account for reference. Clean and Mop Bathroom. Participate in Teams. Check reservations.

Wednesday – Contact delinquent tenants and notate their account for reference. Sweep thoroughly and mop floors in office. Update ASM Website. Check available units (a few in each size) to see if needs to be cleaned. Participate in Teams. Check reservations.

Thursday – Contact delinquent tenants and notate their account for reference. Market for property. Tenant Rate Increases (Revenue Rule Occupied). Participate in Teams. Check reservations.

Friday – Contact delinquent tenants and notate their account for reference, get marketing ideas and material ready for the following week, Thorough Walk-Thru completed and signed. Participate in Teams. Check reservations.

Saturday – Contact delinquent tenants and tenants that will go delinquent on following Sunday and Monday. Participate in Teams. Check reservations.

Renting a Unit - To properly rent a unit, follow the procedures below. Note: These procedures are not software specific, they are only meant to be a general guide. Please refer to your software user manual for further help with software specific questions.

1. Scan in the customer's state issued identification. They must have a physical address on this ID, no PO boxes. Name the upload file to ease the process of searching for it later if needed.



2. Either have the tenant enter their personal information in via tablet or ask them all required information while entering it into the software. The tenant info sheet should only be used as a guide, or to help expedite the rental process. If this sheet is used, it should not be scanned in, and destroyed after rental. **(Be sure to obtain more than one phone number for the customer.)** You will enter this information into the property management system. See your specific software user's manual for complete details on entering customer information. Verify the customer's address.
3. It is required that we fill out the marketing information via the check boxes upon move in. This information should be entered the appropriate area on your property management software (Door Swap, Taskmaster, Site Link, E-move, etc.,).
4. Obtain the last four of the tenant's social security number and enter into the system. This is important for identity verification purposes.
5. Encourage the tenant to sign up for autopay, and if accepted make sure you get the autopay form filled out and signed. Only put the last 4 digits of the card number or bank account number on the form and be sure to shred after this is loaded into Door Swap.
6. Obtain the necessary amount of payment that the computer shows due on move-in. Tell them that we will email them a receipt, and that all future receipts will be delivered via email.
7. After printing the lease, fill in by hand the top section regarding military status and lien status of contents. Remember that we DO NOT make copies of military IDs, but they should be verified.
8. DO NOT write on or highlight anything on a lease other than the fields referenced above in line #6.

Review the lease with the customer. Make sure you hit the main points of the lease such as:

Verification of address and phone numbers

Unit number



Payment due date

Late fees and late fee schedule (including auction schedule)

Payment options

Access hours

Keypad and code instructions

Forbidden items

Insurance options

Office hours

Change of address procedure

General property rules (i.e. dumpster use, tailgating, etc.)

Also, it is important to give them an opportunity to ask questions.

9. Reiterate the access hours and accompany the customer to the entry keypad and let THEM enter their code to make sure that it works. Allowing them to enter the code ensures that they are pressing the right buttons in the proper sequence and with enough pressure.
10. Scan the lease and other signed documents into Door Swap, then hand all originals back to the tenant.
11. Thank the customer for their business, let them know about our Referral Program and let them know that we are available if they have any concerns.
12. Finally, take any vacant unit locks off the unit so that the unit will be ready for the customer to move in.



A tenant's DoorSwap account ***must*** contain a copy of the customer's ID, insurance addendum, autopay authorization, and a ***signed*** lease. **Without a signed lease, we have no agreement with the customer.**

STEP 1:

How did you *first* hear about us?

- Drive-by/ Signage
- Internet
- Yellow Pages
- Referral
- Coupon
- Previous Customer
- Other
- Unknown
- Social Media
- Flyer

Have you used self storage in the past?

- Yes
- No

Why did you choose us? (check all that apply)

- Location
- Prices
- Curb appeal
- Coupons/promotion
- Security/lighting
- Management
- Other features

Travel distance to facility?

- less than 1 mile
- 1-4 miles
- 5-10miles
- 10+ miles

What is your reason for storing?

- Needed space
- Moving
- Business needs
- Renovating
- Life Change (Marriage/Divorce/etc.)
- College
- Other

What type of good do you plan to store?

- Business
- Residential

Planned Length of Stay:

- 1-2 months
- 3-5 months
- 6-11 months
- 12+ months

UNIT # _____

What are you storing at our facility? (Check all that apply)

- Misc. Boxes
- Furniture
- Clothing/Personal Items
- RV/Boat /Vehicle
- Business Inventory/Records
- Other

Gender:

- Male
- Female

How did you first contact us?

- Call to facility
- Call toll-free #
- Visit to website
- Visit the facility

STEP 2: TENANT INFORMATION

NOTICE: For added security, we require that a photocopy of tenants' ID or a digital photo be kept on file.

NAME: _____

MAILING ADDRESS: _____

CITY _____ STATE _____ ZIP _____

PHONE (Home): _____ PHONE (Mobile): _____

PHONE (Work): _____ SOCIAL SECURITY #: XXX - XX - _____

EMAIL ADDRESS: _____

PLACE OF EMPLOYMENT: _____

ACCESS CODE: _____ Our staff will help with this code

REFERRED BY: _____

ARE YOU AN ACTIVE MEMBER OF THE MILITARY? _____ If yes, additional paperwork is required.

EMERGENCY CONTACT INFO - Not in the same house, PLEASE!

NAME: _____

ADDRESS: _____ City _____ Zip _____

PHONE (Home, Work, or Mobile)(_____) _____

FOR RV BOAT AND VEHICLE STORAGE:

YEAR _____ MAKE _____ MODEL _____

TAG: State _____ Number _____

PROPERTY MANAGEMENT SOFTWARE:(Based on Door Swap procedures)

Door Swap features can be practiced using the username 'tstaff' and the password 'tstaffPa55' at www.DoorSwap.com. Anything you do here will not hurt anything, just remember not to use any real email addresses because the site will send out confusing emails!

Remember if you need help in Door Swap, first contact your property manager or a trainer for assistance. If they cannot help you, contact support@DoorSwap.com before calling them directly.

Running an Opening

- Click 'Reports'
- Select 'Report Sets'
- Select 'Render Set' next to 'Beginning of Day' or 'Opening Reports'
- Click 'Download' in the pop-up box to view

Running a Closing

- Click 'Reports'
- Select 'Report Sets'
- Select 'Render Set' next to 'End of Day' or 'Closing Reports'
- Click 'Download' in the pop-up box to view

How to perform a Move-in

- Click 'New Customer' in the quick navigation in the middle of your screen
- Fill out all the required personal information from the new tenant
- Ensure that they have an acceptable access code
- Complete all the drop-down marketing questions
- Click 'Find Unit' and select the desired unit from the menu
- Click 'Assign Selected Unit'
- If retail is included, click 'Add Charge' under 'Initial charges and credits'
- Ensure that all charges and discounts are correct

- Click save
- Collect payment

How to perform a Move-out

- Check unit to ensure that the lock was removed, and unit was left empty before moving them out.
- Click 'Edit Customer' in the quick navigation in the middle of your screen
- Search for the tenant you wish to move out in the search bar
- Click the tenants name
- Select 'Move Out' to the right of the tenant's account screen, under their unit number
- Ensure that there is a \$0 balance in the pop-up box. If there is not, you must create an appropriate credit in 'Account Activity' to eliminate this balance before moving the tenant out
- Click 'Yes'
- Select 'Download' in the pop-up box to view the move out report

How to take a payment

- Click 'Edit Customer' in the quick navigation in the middle of your screen
- Search for the tenant you wish to take a payment for in the search bar
- Click the tenants name
- Select 'Make Payment' next to 'Current Balance'
- Select the appropriate 'Payment Type' from the drop-down menu
- In the 'Payment Description' box, type how the payment was received. Such as walk in, call in, email authorize, etc.
- If the payment is a check, enter the check number in the appropriate box. If it is a credit card payment, type in the required information
- If there is a name other than the tenant's on the payment, select 'Other' in the 'Name on Payment' box, and type in the appropriate name
- Ensure that all collected funds are applied to the tenants account by using the 'Prepay' selection next to the tenant's rate at the top of the payment window. Select the appropriate number of months needed to ensure all money collected is applied.



- If tenant is present, ask them if they need a printed copy of the receipt, ensure them that it is emailed to them automatically. If they still want a physical copy, check the 'Print Receipt' box
- Click 'Make Payment'
- If printed receipt was needed, select 'Download' in the pop-up box to view and print receipt

How to sell retail to non-tenants

- For non-tenants, Select 'Retail Sales' in the quick navigation in the middle of your screen
- Select the desired retail in the 'SKU' drop down menu
- If multiple items are desired, click 'Add line item' and repeat previous steps as many times as necessary
- If multiple quantities are desired of each item, type in the desired quantity in the 'Quantity' box
- Click 'Checkout'
- Collect payment

How to sell retail to current tenants

- For tenants, select 'Edit Customers' in the quick navigation in the middle of your screen
- Select the 'Account Activity' tab
- Click the 'Create Charge' option under the transaction box
- Select the desired retail in the 'SKU' drop down menu
- If multiple quantities are desired, type the desired quantity in the 'Quantity' box
- Click 'Save'
- Repeat previous steps for each retail item needed
- Collect payment
- There are to be no refunds on retail, ALL SALES ARE FINAL

Only non-tenants (i.e. retail customers or someone paying for someone else's unit) will be required to sign credit card receipts.

How to set up online access for tenants

- While in the tenants account, click the 'user info' tab. You can enter the tenants email address in the username section, and a temporary password in the password section and click save. Give this information to the tenants for online access. You may also click the 'Send online instructions' button to send them a registration code to the email address on file.

Lien Holders

- If your new tenant expresses that some of their property has a lien on it, such as car or rental furniture, this information must be handwritten in on the front page of the lease prior to signing. This MUST be written by the tenant and must be filled in before they sign.

Generating Statements

There are a couple of different options to send statements from the tenants account.

- Click the User Info tab, then the General tab

Email Statement YES/NO - This is just for email

US Mail Statement YES/NO – this is to send automatically through the mail service

- Click the Lease-Settings Tab

Print Statement – Queues statement as a print job

- All work independently of each other.

If all 3 are set to yes, you will get a print job, tenant will get an email and a US Mail statement

- If you want to send from the office, set US Mail and Email to NO and Print to YES
- You can set this up any way you would like. To get a print job, you must use the Print statement on the Lease-Settings Tab even if you have US Mail Statements set to YES.

Key Reports

Company Summary:

The company summary provides information concerning the general economics of the property, at a glance. Information is provided for both the current month and YTD (year to date). To access the Company Summary:

1. Go to Reports (On Main Screen)
2. Click 'Company Summary'

Master Occupancy Report:

The utilization summary provides information concerning the use of property space. Information is provided as to square footage as well as unit occupancy, availability, delinquencies, income potential, and income loss. To access the

Master Occupancy Report:

1. Go to Reports (On Main Screen)
2. Click 'Master Occupancy'

Available Unit Report:

This report lists every unit available for rent according to unit size and type. Also, on this report is the rental rate for each unit size. To access Available Unit Report:

1. Go to Reports (On Main Screen)
2. Click 'Available Units'

Cash Drawer Activity Report:

Provides totals for all monies received throughout the day and the form of monies received whether cash, check or credit card. Note that promo payments are not included as no actual monies are involved in promo payments. To access Cash

Drawer Activity:

1. Go to Reports (On Main Screen)

2. Click 'Cash Drawer Activity'

Lock Action Report:

This report lists all units that should have an overlock placed or removed. This report also displays the date the last payment was made as well as the paid through date. To access Lock Action:

1. Go to Reports (On Main Screen)
2. Click 'Lock Action'

Collections:

This is a very valuable report as it will assist you in managing your account receivables, which are all uncollected monies due to the property by current tenants.

This report contains a list of customers with balances due and may be printed in a various order. Phone numbers are listed for each customer and a comments column is provided for notes. To access Collections:

1. Go to Reports (On Main Screen)
2. Click 'Collection'

Daily Walk Around Report:

A list of all units in order, which indicates number of days past due and overlock status. A place for comments is provided. To access Daily Walk Around:

1. Go to Reports (Main Screen)
2. Click 'Daily Walk Around'

Exception Report

This report will give a summary of items that need immediate attention such as deleted units, past due rate increases, etc. This should be checked regularly to ensure everything is being addressed.

1. Go to Reports (Main Screen)
2. Click 'Exception Report'

Credit Reasons

- *Auction/Bad Debt* – This credit reason should be used in the following situations:
 - When a unit is taken through the auction process and a balance is still owed, this credit reason should be used to reduce the balance to \$0.
 - When a settlement is negotiated with a customer to make a partial payment and move out of the unit.
 - When a unit is found vacant as it is going through the auction process.
 - Of note, rent, late fees, and lien fees should all be credited to Auction/Bad Debt, in the above situations.

- *Cancelled Service* – This credit reason should be used when moving a unit out. This automatically occurs when moving the unit out, if the unit is within the grace period (i.e. before the first late fee assesses).

- *Discounts* – This credit reason is automatically credited when a discount (either move-in or ongoing) is credited to an account. All discounts should be pre-set. Referral discounts also get put into this credit reason.

- *Customer Relations* – This credit reason should be used to compensate customers for issues they encounter while storing with us. This credit reason should be used sparingly and only if the credit cannot fall into ANY other category. As with all credit reasons, we should explain in detail why this credit was issued.

- *Transfer Credit* – This credit reason should be used to move funds from one account to another. Examples:
 - Customer has two prepaid units and is moving out of one, funds need to be moved out of one account and credited to the remaining account.
 - Manager makes a payment to the wrong account; funds need to be moved.

- *Removed Insurance* – This credit reason should be used to remove insurance from an account that has already been assessed. For example, if someone is assessed an insurance charge on their anniversary date of the 14th, and they come in to pay on the 15th, but want to remove the insurance, you would do so by using this credit reason.
- *Waived Late Fees* – This credit reason should be used to waive late fees and lien fees only. This credit reason should only be used for customers that will continue to be customers of the property. For example, if we waive a lien fee as an enticement to get the customer to bring their account current, it would be credited to Waived Late Fees.
- *Waived Rent/Other* – This credit reason should be used to waive or “write-off” rent and any other miscellaneous charges. This credit reason should be used sparingly and explained in detail. An example of this would be if a unit is discovered vacant after the grace period (should happen infrequently).

Make sure to get approval from your supervisor before issuing a credit on an account. Ensure that you are being very precise in your description on your credits so there is no question on why it was issued.

Vacating Policy

The vacating policy will vary slightly between locations, but we would like at least a five-day written notice shall be turned in to the office by the tenant, unit shall be left clean/empty, and they shall remove their lock. The lease agreement signed upon move in will state the policy as follows;

This agreement shall continue from month to month unless Occupant or Owner delivers to the other party a five-day advanced written notice of its intentions to terminate the Agreement. Upon termination of this Agreement, Occupant shall remove all personal property from the space and shall deliver possession of the space to Owner unless such property is subject to Owner's lien rights as referenced in this Rental Agreement. If Occupant fails to fully remove its property from the space within the time required, Occupant shall be an Occupant at sufferance and Owner, at its option, may, without further notice or demand, either directly or



through legal process, reenter the Occupant's unit and remove all property therefrom without being deemed guilty in any manner of trespassing or conversion. No refunds are allowed for partial- month occupancies, we will only process refunds for 'Prepaid accounts. Any refunds will be processed through Doors Swap Payables, even if processed the same day as payment. This is completed by submitting a Refund Request. Occupant shall be charged a CLEAN UP FEE, identified above, if Owner is required to remove any debris from either inside or outside the rented Space after Occupant vacates the Space.

Additionally, there is **NO PRORATING**. Our agreements are month to month, and there will be no charge less than the agreed upon amount.

Financial Responsibility

Accounting Errors:

Financial accountability is essential; therefore, accuracy is essential. However, we all make mistakes. Our property management systems allow us to fix our mistakes the same day they happen. These mistakes are most often discovered when making up the day's deposit. For this reason, the deposit **must** be done at the end of each day. Check and credit card errors are easy to spot and fix, cash mistakes are not. Please ensure that any and all mistakes are documented and clarified in Door Swap notes.

Payments:

Be sure that you enter payments correctly into the computer and always ensure the customer was emailed a receipt.

All payments should be verified for both the customer's protection and the company's.

Cash Payments:

A good rule to follow when dealing with cash is to always count it twice, and ALWAYS use a counterfeit detector.



When taking cash payment, you should always verify:

- The customer's account
- The amount of the payment
- The amount of your entry into the computer software.

Always email the customer a receipt for a cash payment.

Our property management systems allow you to put in the actual amount of money tendered and then will indicate how much change to give the customer. However, you must still count the money out to the customer to ensure the correct change has been given.

Check Payments:

Checks accepted for payment must have the account holder's information printed on the check. **No starter checks or counter checks are to be taken.** All checks must be made out to the specific property. No payroll checks may be cashed. If account holder receives an NSF at any time, they are not allowed to write company any more checks for their payments, they must pay in cash or money order.

NOTE: No checks are to be accepted for auction units, or accounts more than 60 days delinquent.

Money Order and Traveler's Check Payments:

Money orders and traveler's checks must be signed and are entered in the computer and on the deposit slips as checks, however they are as good as cash and may always be taken for any payment.

E-Check Payments

Some of our properties use computer processing programs for E-check (electronic check). When using this payment method, the customer's bank routing number and account number are entered into the computer in the same manner that a



credit card account number and expiration are entered. Auto payments with these programs are automatically processed daily. You must manually perform a settlement daily and ensure that all payments did process.

Bank Deposits

Bank deposits are to be ran in Door Swap at the end of the day. The daily bank deposit is to be locked up in the office until the next day when it can be taken to the bank during normal business hours. Occasionally there are legitimate reasons not to take a deposit to the bank such as bank closings, but these occasions are rare. A deposit should be made daily, unless your supervisor has instructed differently. Our support personnel writes checks on the account at various times during the month if the money is in the bank; **therefore, it is critical that deposits are made promptly.**

Check Scanners:

Properties that are too far from a physical bank location may use check scanners at the property to complete deposits. At these properties, you must purchase money orders for all the cash you take in. Money orders **MUST** be purchased any time you have \$300 or more in cash, every Friday no matter the amount, and the last day of each month no matter the amount. Email accountant with any sign in issues you may experience.

Cash Drawer:

Each property has a set cash amount to do business with. The cash drawer should always contain a minimum of \$100 . If you collect the correct amount from the customer and give the correct amount back, you will have exactly what you started with after the deposit is made. Be sure to count your cash drawer twice daily and recorded on the cash count sheet. If there is a variance, it must be explained in detail on the daily paperwork that is sent to your supervisor. **ALWAYS** ensure that that cash drawer is locked. **Note: Discrepancies between deposits and daily paperwork are taken seriously and investigated thoroughly.**

Petty Cash



Each facility has a petty cash fund. This fund is to be used to purchase postage, office supplies, cleaning supplies, etc. Any purchase over \$100 should first be approved by your supervisor (unless it is an emergency repair expense.)

For every penny that comes out of petty cash, an equal amount must be returned to it in the form of a receipt. Your petty cash fund should also be counted twice daily and recorded on the cash count sheet. This is done by totaling the receipts, any outstanding reimbursement requests, and the cash. All three should equal the exact amount of your petty cash fund, which is usually \$250.00, but may be at some properties.

Petty cash is not to be used for any personal reasons AT ALL. Only use these funds for small items needed directly by your property such as pens, paper, weed spray, etc. NEVER pay for ANY services out of petty cash, always put a contractor's invoice through payables for a check to be sent to them, no matter how small the amount is.

Be sure to itemize cash receipts or bills that were not itemized at place of purchase. For example, do not list "office supplies" or "cleaning supplies." Itemize the receipts with a complete description. Do this directly on the receipt if there is room, at the time of purchase.

The company will reimburse the property with a check made payable to you and not the facility. This is so that you may cash it at your local bank. Please attach the bottom portion of the check (the part with the vendor invoice number, date, and check) to the Petty Cash Receipts that were submitted for reimbursement in your office as a permanent record. Petty cash WILL NOT be reimbursed if a receipt is not received for the item listed. Avoid submitting receipts which you have written and signed. Keep copies of all receipts and forms submitted for your protection in the event one gets lost or misplaced.

Reimbursement of Petty Cash

- Under "Payables"

- Click – Add Invoice
- Select Vendor (Made payable to you)
- Make sure you put Invoice Number in Invoice Number box
- Description – Should say Petty Cash
- Itemize expenditures in the order in which they occurred. Describe the purchase in detail in line item description.
- Make sure you are choosing the correct Expense Account on which item needs to be coded to.
- You must scan petty cash receipts into computer and attach into management program under Vendor you entered for payment.
- Your petty cash fund should always balance. The property Manager has primary responsibility for the petty cash fund and therefore should keep control of it. Every time a purchase is made you should enter it on the form and reconcile the cash.
- Do not allow this fund to become depleted. Submit a report as often as necessary (about every \$100).
- The amount of this expense request plus cash on hand plus any previous reports not yet reimbursed must equal the total petty cash fund amount.

Truck Rental Drawer:

Some properties rent moving trucks (such as U-Haul). For those sites, this drawer should be counted and recorded on the cash count sheet daily as well. A preliminary report should be printed from the rental company's website, and the total daily receipts should match this report. A separate deposit for truck rental is done daily or weekly, at the discretion of the supervisor.

Budgeting Process

The manager's main involvement in the budgeting process is to work with their supervisor in making challenging, yet realistic projections. In September and October, your supervisor will begin the budgeting process for the next year. That is the time to make suggestions on the rental projections, expenses and large items needed to improve the property. When making suggestions, include the approximate cost and expected gain from the changes.



Each property has a comprehensive budget. Although you do not have to memorize the budget, but you should be somewhat familiar with it and know where to find it. It is not always possible to stay within budget in every area all the time, but you should strive toward this end. If you can remain under budget in some areas, it will help offset the overages in other areas.

See sample budget below:



ASM	SQFT	51,810													2009	2009	2009
Sunday, May 17, 2009	Rentals/m	25	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Total	PSQFT	% of GPI
INCOME	Total Unit:	413															
Street/Tenant Rate Increase			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			
Gross Potential Income			34,130	34,130	34,130	34,130	34,130	34,130	34,130	34,130	34,130	34,130	34,130	34,130	409,560	\$ 7.91	100.0%
Physical Occupancy			41.0%	43.0%	46.0%	50.0%	54.0%	58.0%	63.0%	67.0%	70.0%	72.0%	71.0%	70.0%			
Rental Income			13,993	14,676	15,700	17,065	18,430	19,795	21,502	22,867	23,891	24,574	24,232	23,891	240,617	\$ 4.64	58.8%
Monthly Discount Percentage	Monthly		6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%			
Discounts			(840)	(881)	(942)	(1,024)	(1,106)	(1,188)	(1,290)	(1,372)	(1,433)	(1,474)	(1,454)	(1,433)	(14,437)		
Bad Debt	2.0%		(280)	(294)	(314)	(341)	(369)	(396)	(430)	(457)	(478)	(491)	(485)	(478)	(4,812)		
Net Rental Income			12,874	13,502	14,444	15,700	16,956	18,212	19,782	21,038	21,980	22,608	22,294	21,980	221,368	\$ 4.27	54.1%
Other Inc																	
Retail Income			220	220	220	220	220	220	220	220	220	220	220	220	2,640		
Admin fees	20% \$ 10.00		50	50	50	50	50	50	50	50	50	50	50	50	600		
Late fees	25% \$ 15.00		635	666	712	774	836	898	976	1,038	1,084	1,115	1,100	1,084	10,919		
Insurance	15% \$ 6.00		46	48	51	56	60	65	70	75	78	80	79	78	960		
Truck			800	800	800	800	800	800	800	800	800	800	800	800	9,600		
Misc			-	-	-	-	-	-	-	-	-	-	-	-	-		
Total Other			1,751	1,784	1,834	1,900	1,967	2,033	2,116	2,182	2,232	2,265	2,249	2,232	24,545	\$ 0.47	6.0%
Total Income			14,625	15,286	16,278	17,600	18,922	20,245	21,898	23,220	24,212	24,873	24,543	24,212	245,913	\$ 4.75	60.0%
EXPENSES																	
Advertising YP			225	225	225	225	225	225	225	225	225	225	225	225	2,700		
Advertising Other			370	370	370	370	370	370	370	370	370	370	370	370	4,440		
Subtotal Advertising			595	595	595	595	595	595	595	595	595	595	595	595	7,140	\$ 0.14	1.7%
Salaries			2,800	2,800	2,800	2,800	2,800	4,368	2,912	2,912	2,912	2,912	4,368	2,912	37,296	0.72	9.1%
Incentives (Percent of S)	10.0%		280	280	280	280	280	437	291	291	291	291	437	291	3,730		
401K (up to 4%)	0.0%		-	-	-	-	-	-	-	-	-	-	-	-	-		
Bonus truck	25.0%		200	200	200	200	200	200	200	200	200	200	200	200	2,400		
Taxes	10.0%		328	328	328	328	328	500	340	340	340	340	500	340	4,343		
Workers Comp Ins.			28	28	28	28	28	43	29	29	29	29	43	29	369		
Health Ins			-	-	-	-	-	-	-	-	-	-	-	-	-		
Dental / Vision / Life			-	-	-	-	-	-	-	-	-	-	-	-	-		
Other (training, travel, etc)			30	30	30	30	30	30	30	30	30	30	30	30	360		
Subtotal Personnel			3,666	3,666	3,666	3,666	3,666	5,578	3,802	3,802	3,802	3,802	5,578	3,802	48,497	\$ 0.94	11.8%
R&M Apt			-	-	-	-	-	-	-	-	-	-	-	-	-		
R&M Building			130	130	130	130	130	130	130	130	130	130	130	130	1,560		
R&M Computer			65	65	65	65	65	65	65	65	65	65	65	65	780		
R&M Elevator			-	-	-	-	-	-	-	-	-	-	-	-	-		
R&M Equipment			30	30	30	30	30	30	30	30	30	30	30	30	360		
R&M Grounds			300	300	300	300	300	300	300	300	300	300	300	300	3,600		
R&M Security / Gate			75	75	75	75	75	75	75	75	75	75	75	75	900		
Reserve Cap Ex Per Square Foot			-	-	-	-	-	-	-	-	-	-	-	-	\$ -	0.0%	
Subtotal R&M			600	600	600	600	600	600	600	600	600	600	600	600	7,200	\$ 0.14	1.8%
Electric			650	650	650	700	760	900	900	900	900	850	650	650	8,960		
Gas			-	-	-	-	-	-	-	-	-	-	-	-	-		
Water			70	70	70	70	70	70	70	70	70	70	70	70	840		
Telephone			225	225	225	225	225	225	225	225	225	225	225	225	2,700		
Trash			60	60	60	60	60	60	60	60	60	60	60	60	720		
Internet Access			80	80	80	80	80	80	80	80	80	80	80	80	960		
Subtotal Utilities			1,085	1,085	1,085	1,135	1,195	1,335	1,335	1,335	1,335	1,085	1,085	1,085	14,180	\$ 0.27	3.5%
Insurance Prop & Liab			210	210	210	210	210	210	210	210	210	210	210	210	2,520		
Subtotal Insurance			210	210	210	210	210	210	210	210	210	210	210	210	2,520	\$ 0.05	0.6%
Mileage	Miles per	175	\$ 0.450	79	-	-	79	-	79	-	-	-	-	-	315		
Bank Service Charges	% of Cust	40	Fee %	40	40	40	40	40	40	40	40	40	40	40	480		
Bank Credit Card Fees	10%	2.5%	37	38	41	44	47	51	55	58	61	62	61	61	615		
Entertainment/Meals			40	40	40	40	40	40	40	40	40	40	40	40	480		
Foreclosure			45	45	45	45	45	45	45	45	45	45	45	45	540		
Inventory - Cost of Goods Sold	50%		110	110	110	110	110	110	110	110	110	110	110	110	1,320		
Licenses/Fees/Dues/Sub			40	40	40	40	40	40	40	40	40	40	40	40	480		
Education			40	40	40	40	40	40	40	40	40	40	40	40	480		
Pest Control			25	25	25	25	25	25	25	25	25	25	25	25	300		
Postage			60	60	60	60	60	60	60	60	60	60	60	60	720		
Printing / copies			-	-	-	-	-	-	-	-	-	-	-	-	-		
Professional Fees			100	100	100	100	100	100	100	100	100	100	100	1,200			
Rental Truck Expenses			-	-	-	-	-	-	-	-	-	-	-	-	-		
Supplies - Bldg			160	160	160	160	160	160	160	160	160	160	160	160	1,920		
Supplies - Office			200	200	200	200	200	200	200	200	200	200	200	200	2,400		
Subtotal Other			975	898	901	983	907	911	993	918	921	1,001	921	921	11,250	\$ 0.22	2.7%
Property Taxes			300	300	300	300	300	300	300	300	300	300	300	300	3,600	\$ 0.07	0.9%
Off Site Management	6.0%	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	24,000	\$ 0.46	5.9%
Total Expenses			9,431	9,354	9,357	9,489	9,473	11,528	9,836	9,760	9,763	9,593	11,289	9,513	118,387	\$ 2.29	28.9%
Net Operating Income			5,193	5,932	6,921	8,111	9,449	8,716	12,062	13,460	14,449	15,280	13,253	14,699	127,526	\$ 2.46	31.1%
Debt Service - Principal (or total payment)			-	-	-	-	-	-	-	-	-	-	-	-	\$ -		
Debt Service - Interest			-	-	-	-	-	-	-	-	-	-	-	-	\$ -		
Capital Improvements			-	-	-	-	-	-	-	-	-	-	-	-	\$ -		
Cash Flow			5,193	5,932	6,921	8,111	9,449	8,716	12,062	13,460	14,449	15,280	13,253	14,699	127,526	\$ 2.46	31.1%

Saving money on expenses is the next best thing to increasing revenues.



All businesses have expenses, and we do want a professional appearance, but do you really need the largest trash dumpster offered, or the most expensive printer paper you can find? When shopping for the property, it makes sense to pretend you are spending your own money. This is an often-neglected area in which you can increase the property's profitability, which is certainly part of your job.

Auto Pay:

At most properties, we can charge a customer's credit card or bank account monthly. Anytime, someone would like this service, we should have them fill out a Credit Card Authorization form. If the customer were to come back and deny the charges, this would be the only proof we have that we charged the customer's card in accordance with their wishes. If a tenant is in the office when signing up for autopay, they should complete an autopay form. After entering credit card info into Door Swap, ensure they only entered the last four numbers of their card before scanning into Door Swap. If a customer commits to signing up for autopay over the phone, an autopay form is not required as long as the card is in the tenant's name. Enter autopay information into Door Swap and add a note in the system that the customer signed up for autopay over the phone.

It is desirable that we get as many customers as possible to sign up for automatic credit card billing when they rent a unit. This will help us keep our accounts receivables low and reduce the number of invoices sent. As such, we will offer an incentive for our customers to sign up for this service. We will waive the administration fee at time of rental, or if your property does not have an administration fee, offer to deduct \$20 instantly at the time of rental. Ask your ASM Supervisor what special you can offer.

The way it has been presented with success is asking the customer while they are giving you their information for rental. This makes it an incentive to sign up and gives them a good discount at time of rental. A sample presentation may go like this: *"By the way, we can save you an extra \$10 today if you would like to sign up for automatic credit card billing. Automatic credit card billing takes the hassle out of paying rent monthly by charging a credit/check card when the rent is assessed. This service is free of charge to our customers. Would you like to go ahead and sign up today and save the \$20 administrative fee?"*



Sending Online Payment Instructions

Online payments are a great way to make your job easier by delivering convenience to our tenants. Upon move in an email should be generated giving them instructions on how to sign up for online access, but if they are an old tenant, or there was a problem, there are two things we can do. In the customer information window, click on the 'User Info' tab. There is a 'Send Online Instructions' button that will email the customer a registration code to set up their online account. You can also input their username and password right here for direct log in. It is standard to enter their email as their username, and gate code as their password.

Retail Inventory

At our properties, we sell a variety of moving and packing supplies, including locks and boxes. It is important to do monthly inventory counts, and to ensure that prices are set appropriately. To complete these checks in DoorSwap, click on the 'Financial Setup' tab on your dashboard. Then select 'SKU & Product Manager'. Here you will see a list of all your property's retail items with prices and inventory count. To adjust any of these, just select which item that needs updating, then select 'Edit SKU' at the bottom of the window.

Always order inventory before you run completely out to avoid missing any potential sales. ASM has accounts set up with Chateau and various other companies to obtain properties discounts on orders. Refer to your purple binder for login information to order your inventory.

Collections

Calling people to ask them to pay their bill is a very necessary duty. With the proper attitude and a little foresight, it can be made easier. If both home and work phone numbers were entered into the computer at the time of rental, both numbers will be printed out on the collections report. When calling customers, be considerate and polite. State the facts and ask when payment can be expected. Never threaten or speak rudely to a customer.



It is required that you make notes on your collections report as you finish each call. These notes are to be entered into the comments section of each customer's account once calls are finished. Entering Promise to Pay Dates and Call Back Dates are very important. Each time you enter a note in the comments section, you are "building" a history, or pattern, for this customer. This can be invaluable in the event of legal action. Reminder; if there is note on the account means you DID NOT call.

Wrong numbers and disconnected numbers are a frequent occurrence. This makes the job a little more difficult, but not impossible. Work numbers are often the best contact number for customers. If you cannot reach the customer at home, work, or on a cell phone, it is time to pull the file and call the alternate contact listed on the information sheet. Leave a message for the customer but do not divulge personal information.

Use online texting services such as pinger.com to aid with collections. Some tenants may not answer a phone call but will respond to a text. The same goes for email.

Collection Script Example: (This will change based on location and late fee structure)

Voicemail:

NOTE: If tenant's name is not revealed in the voicemail message ONLY LEAVE A VERY GENERIC MESSAGE

This message is for tenant's name this is _____ at ASM Self Storage If you could give us a call back at 555-555-0987 that would be great! Once again (Repeat above). We are in the office until 6pm today. Thank you.

1-4 days past due:

Hello! This is _____ with ASM Self Storage. I'm calling just to give you a friendly reminder about your past due account. Currently you are _____ days past due in the amount of _____.

After five (5) days there will be a \$10.00 late fee added to your account. To avoid this additional fee, I will be happy to process a payment for you over the phone or



you can use our on-line payment method for your convenience. How would you like to pay today?

5-30 days past due:

Hello! This is _____ with ASM Self Storage. I'm calling about your past due account. How would you like to make your payment today? There has already been a late fee(s) added to your account. (5 days- \$10.00) (10 days- \$10.00) total late fees \$20.00

If no-When can we expect you to make a payment? Date?

30-44 days past due:

Hello! This is _____ with ASM Self Storage. I'm calling about your past due account. You are currently _____ days past due if payment is not received today there will be a \$100.00 lien fee added to your account and the auction process will start. How would you like to process a payment today?

45 + days past due:

Hello! This is _____ with ASM Self Storage. I am calling to let you know that your account is over 45 days past due this means that your unit is getting ready to be set for auction. Your past due amount is currently _____ how can we secure that payment to bring your account to a current status today?



Section Three – Your Property

Your property is a reflection of you and our company so everything must be clean, presentable, and in working order at all times. Please make sure to always follow OSHA regulations in all aspects of property maintenance. In this section, we will cover items that will guide you in keeping the best property that you can!

Gate

Your property gate is one of the main focuses of your property due to the security qualities that it possesses. An attractive and functioning gate may be the deciding factor in renting to a tenant or not. The following will help ensure that your gate stays functioning as it should;

- Ensure that your gate software is communicating with Door Swap as it should, through AR nexus or other bridge software. This will keep your tenants' codes updated with their account in Door Swap.
- Oil your gate chain once a month. Be sure to ONLY use specialized gate chain oil, as others can cause malfunction.
- Make sure keypads and pressure pad are tested and cleaned regularly.
- Keep your gate operator locked to keep anyone from tampering with the equipment.
- In case of a malfunction or power outage, know how to open your gate manually. Most gate operators have a manual crank inside that will open the gate in these situations.
- Make sure your purple binder is up to date with the name and number of a reputable gate repair service in case of malfunction.
- Keep up with gate maintenance with the Maintenance Checklist.
- Make sure you create a Master Gate Code that is 24-hour access to use in emergencies and to provide to emergency personnel. Create a separate gate code to access the property when showing units to potential tenants.

The property should maintain a gate code that is only used to show potential customers the property. This will minimize the risk of someone gaining access to the property by watching the code that is entered as they are being shown the property. This code should be set to work only during office hours. That way if



someone does obtain the code by watching the manager/asst. enter it into the keypad, they will only be able to gain access to the property during office hours. At no time, should the manager/asst. use their 24-hour code to enter the property when they have a customer or potential customer with them.

Make sure you have identified all access points into your property so you ensure you keep them checked and secured. This could be walk in gates, loading docks, or a back door from your office.

Familiarize yourself with your properties access hours. Some properties have 24-hour access, some have restricted hours, and some allow special case 24-hour access. Review your gate log daily to see who is coming in at what times to identify problems before they develop. For example, if the same tenant is coming in every night at 8pm and not leaving until 4am, this need addressed.

Office

It is important that your office stays cleaned an organized. Become familiar with where everything is in your office including filing system so that you do not waste time trying to find something when it is needed. Follow these guidelines to keep your office in order;

- Windows and doors are cleaned at least once a month but more often if needed.
- Floor is swept or vacuumed daily, washed weekly (minimum); carpets cleaned as needed.
- Computer equipment and office machines cleaned weekly.
- Draperies and blinds cleaned as needed, blinds more often than drapes.
- Office walls are always to be clean and well painted.
- Counters, file cabinets and office furniture cleaned as necessary.
- Office paperwork should be kept in an area out of customer sight.

ALWAYS ensure that all files containing sensitive information are locked up.

The office cleanliness is accomplished by 10:00 a.m. every day.

Apartment

- Please maintain the apartment and report any problems to your supervisor.
- ASM Officers and Supervisors reserve the right to enter the apartment and inspect the general condition with 24 hours' notice to the resident.

Security

Crime Watch stickers

Crime Watch stickers should be placed on each new customer's lock(s). If all the customers have crime watch stickers and suddenly one appears without a sticker, it should alert us to the possibility of break-in. One of many ways that criminals break into self-storage units is by cutting a customer's lock, removing the contents, and then placing a new lock on the unit, so that no one knows the difference until they open the unit. Generally, by that time, it is too late to review video, gate entry, etc.,

Crime Watch stickers are special stickers in that they cannot be peeled off without breaking the sticker into little pieces. They can be ordered by calling Chateau.

Over Locks

Over locks are for locking tenants out. They should **NEVER** be alone.

The following scenarios explain how to handle using over locks;

- Customer is late on their rent – Place over lock on unit with customer's lock
- Customer lock is missing – Place over lock and seal tag on unit until customer gets to the property with new lock and add notes in Door Swap explaining the situation with the seal tag number. If they take more than a couple of days to get to the property, charge them for a lock and put it on their unit, then mail them the keys
- Cut lock for auction – Place over lock back on unit with a seal tag and always complete this process with another team member. Complete auction paperwork, and put notes in Door Swap explaining process



- Cut lock authorization for customer – Place over lock and seal tag on unit until customer gets to the property with new lock and add notes in DoorSwap along with copy of form with the seal tag number. If they take more than a couple of days to get to the property, charge them for a lock and put it on their unit, then mail them the keys. We must have a Cut Lock Authorization Form filled out and signed and the lock cut fee paid before we cut locks for this reason.
- Cut lock due to an emergency – Place over lock and seal tag on unit until customer gets to the property with new lock and add notes in Door Swap about the situation with the seal tag number. If they take more than a couple of days to get to the property, charge them for a lock and put it on their unit, then mail them the keys

Never leave just our over locks on any customer's unit, as this increases liability drastically. Also remember that if there are two doors on a unit, that both doors need a lock.

If a customer does not make it to the facility to receive their keys to their unit after cutting a lock, we will only hold them for 24 hours before mailing the keys to the address we have on file.

Break -Ins

Procedures for handling a break-in:

1. Complete a full walk thru of the property to verify how many units were affected. Lock checks should be completed daily. This will allow you to isolate the time that the break-in occurred.
2. Document everything that could be important and complete an incident report. Take pictures!
3. Call the police. Have them file a report. Ask questions about recent break-ins in the area.
4. Call your supervisor. Report on what you know, what you don't know, and what has been done so far.



5. Call tenants who are in affected units. Most important is to be empathetic. Think of how you would feel if your storage unit was broken into. Offer appropriate assistance.
6. If unit needs repair – offer the tenant a new unit, give them 1 month’s free rent and a lock (preferably a disc lock).

Lock checks should be performed daily.

Inspect property daily, including fences and vulnerable areas.

Never divulge gate codes to anyone but the person to whom the code belongs, and ask for ID.

Do not divulge information about a customer or any personnel.

Do not divulge unnecessary information about the property's security system.

Scan gate logs and cameras daily. Investigate any suspicious findings.

Always be alert for suspicious behaviors, smells, and sounds. Investigate if it is safe and possible to do so.

Notify your supervisor immediately of any discoveries.

Always set burglar alarms and double check locked doors.

Always lock the office when it is left unattended.

When leaving the property at the end of the day, take a moment to be certain that all is secure and be observant as you enter your vehicle.

Emergency Action Plan

The purpose of this plan is to make sure appropriate procedures are in place to protect team members and company buildings in the event of an emergency. This plan describes what immediate action you should take for any emergency situation described. Please read and understand these procedures thoroughly. Keep this information readily available to you so that valuable time will not be lost in event of an emergency.



All properties should have a Risk Kit on site, printed with the Purple Binder and in digital format on the property computer. Please verify that your Risk Kit is always accessible and up to date.

Medical Emergencies

CALL 911 *Send someone to nearest entrance to guide Emergency Personnel to where they are needed. 2. Advise the nearest supervisor. *Give property or area where help is needed. For non-life-threatening injuries, you may go to a local doctor's office.

Fire

All fires must be reported as follows: Immediately notify Fire Department via 911 and notify the nearest supervisor.

***FIRE EXTINGUISHMENT: If the fire seems manageable, an attempt should be made to extinguish it using the nearest fire extinguisher. If not manageable, the supervisor/employer should go to the nearest telephone and notify the Fire Department via 911.

At least one fire extinguisher should be maintained in the office and one in the apartment.

Chemical Spills / Hazardous Materials

In case of an unknown chemical spill or other identification of hazardous materials, evacuate all people from the immediate area and isolate the area. Call local fire department or 911. Immediately notify your supervisor.

Emergency Weather Procedures

In case of severe weather, such as a tornado, stay clear of all windows and doors until the area is clear and it is safe to return to normal operations.

On-The-Job Accidents

Unfortunately, accidents do happen and at times they can be quite serious so it's important that they are handled appropriately. The steps below should be followed always:

1 - The most important thing to do is to take care of yourself. If you are involved in an accident on site and you need medical attention do not hesitate to get to the doctors or the emergency room. Your health at that moment is the top priority.

2 - Once you have come to a point where you are stabilized, we ask that you then take the time to contact your supervisor and explain the situation. No matter how serious the accident is its best to play it safe and communicate this to us. Ideally this would happen within a few minutes to a couple of hours after the incident. Also, try to contact your co-workers to ensure that the site is covered if possible.

3 - Once the supervisor has been notified a determination will be made regarding the reporting of the incident to our worker's comp carrier. If it's necessary to do this, then we are required by law to do so within 24 hours of the incident.

4 - We ask that you continue to stay in touch with your supervisor for the next few days regarding your recovery. Often things feel worse on the day after than they do at the time of the accident.

5 - Finally, upon returning to work it's important that you review what took place and try to find ways to limit our exposure to a similar accident in the future. Accidents will happen but we need to always be looking for ways to prevent them.

Emergency Planning

1. Prior To Emergency:

- Move any important objects, such as computers or paperwork, that could potentially be damaged.
- Always put a sign up on the office if you are forced to be away.
- If there is a potential storm, close facility down ahead of projected hit date (and communicate closure to tenants).
- Schedule who will be at the property and what days and schedule meetings.
- Book hotel rooms for staff



- If you have U-Haul trucks or golf carts, you will need to have a game plan in place for these.
- Camera and DVR functions need to be working
- Get emergency and secondary contact information for team members
- Laptop computers as back up
- Line up moving help – reach out to local moving companies, especially ones that are in our network. We may have to pay for these.
- Consider contacting temp agency to get day laborers if needed to help move belongings. Be sure they are always closely supervised.
- Contact your trash vendor ASAP to line up roll off dumpsters if needed, you will need to get your name on the list. Remember there are a lot of people that call to reserve dumpsters. In most situations, it will take several days to get the dumpster(s) to your location. Schedule an extra dumpster or have current one emptied out frequently.
- Hot Spot for Internet – have one shipped to the property just in case. Purchase a wireless USB adapter for the desktop if the computer does not normally connect to the internet wirelessly (these are cheap on Amazon or can be picked up at an office supply store).
- Cell Phone – consider a pre-paid phone

2. Communication (to tenants, team members, and the vendors):

- Work with Door Swap and other staff to create and send an email for tenants. Call tenants that do not have an email address on file. Run by RM for approval.
- In the event of office hours changing, manual gate operation is necessary, or keypads are nonoperational, post new access hours throughout the property and office and inform all customers that call and visit the property.



- Post messages on Facebook, blog, and the property's website to keep tenants in the loop.
- Communicate with team often. You will need to set up 2 communication meetings with your team members daily.
- Post signs around the property (in office, on office doors, keypads, etc.).
- Use urgent notes in Door Swap to communicate between managers and RMs regarding specific customer issues.
- If you are using a collection specialist, ask them to stop making collection calls until further notice.
- Notify property accountant of any delays in deposits.
- Be sincere and honest with your customers - don't try to sugar coat or be deceptive.

3. Extra Materials:

- Dumpster and roll off dumpsters – make sure you get the exact price of the roll off service. There will be a dumpster rental fee, a collection fee, and a tonnage fee for dumping the load.
- Dehumidifiers, wet vacs, etc. from local equipment rental places (i.e. Lowe's, Home Depot, etc.)
- Damp Rid – get lots of it if its water related
- Consider increasing petty cash at the property for a short period of time.
- Consider getting the property manager an ASM credit card for a short period of time
- Good to have extra locks, boxes, tape, etc. (either borrow from a sister property or buy – give these away to tenants)

4. Ask for Help:

- If appropriate, ask your RM to find another property to help with collection calls while you are dealing with the day to day recovery issues.
- Coordinate with supervisor to bring in additional team members to be on site to assist with customers and clean up.

5. Vendors:

- Door Swap - Free rent or discounts on a large scale? If this is necessary, reach out to Door Swap as they can add credits to multiple accounts in a short amount of time.
- Door Swap - Shut off late notices, lien notices, auction letters with Door Swap if necessary. No need to have a customer who is dealing with a fire or flood get a late notice that will only serve to make them more upset.
- Door Swap - Shut off autopay's in Door Swap if appropriate.
- Door Swap - Turn off online payment options via our website and direct to Door Swap
- SBOATI – Depending on the emergency, SBOATI may not want to accept any claims. Each time a claim is accepted, it costs \$250 to process it, regardless of the outcome of the claim. In most flood situations, SBOATI will deny all claims so it's best if they don't accept them at all to avoid the \$250 fee per claim filed.
- SBOATI - Consider removing SBOA-TI info from the office counters and walls
- Contact Call Center and share any information with them that would be helpful as they take customer calls for us.
- Aggregator - If appropriate, turn off web leads (spare foot, others). Adjust rates and availability on websites. Turn off the API for the website and to XPS if you are no longer renting any units.



- Aggregator - Notify any other web lead program (SpareFoot, USStorage, etc.) to discontinue reservations

6. During and After:

- Identify good units that tenants can move their belongings to. These may be a different location. Overlock vacant units if you are concerned that tenants will move into new units without permission.
- Distribute abandonment notice to tenants if needed, especially in cases of flooding. This can assist in cleaning out the units and not having to take them to auction.
- Designate areas on the property for customers to leave trash. Try to encourage them to take it with them if at possible. Have updated vendor list with gate, dumpster, and utility info.
- If it is a natural disaster, print out the contact info for FEMA and have it available for tenants.
- Overlock units – if security is a big issue, consider overlocking normal units (not delinquent). This may provide another level of security for the customer's belongings.
- Monitor who comes on the site. Don't be afraid to ask for credentials and to question each person. If the property could be unsafe, it's best to get everyone on site to sign a waiver/release acknowledging that the property may be unsafe.
- Document everything – including pictures – save these notes, pictures, comments, emails, etc. to the customer record in Door Swap.
- Hire security staff to patrol facility if needed. Consider locking the gates before and after office hours to maintain security.
- Contact local law enforcement (police and sheriff departments) office to ask for additional property patrols.



- Consider extending office hours to accommodate customers. Look for resources from your RM's other properties to help.
- Think safety first – your safety, your teammates' safety, and your customers' safety. Please don't risk injury.
- Be sure to check the credentials of anyone you hire to do repairs at your site. It's very important that they be licensed, bonded, and insured.
- Cancel any upcoming auctions
- In some events you will need to get the approval from the property insurance company before any tenants can access the property, this is for safety and legal reasons. You will have to get home office assistance on this matter.
- Run HVAC units at a lower temperature than normal to help remove moisture from the air if that is a problem.
- Try to understand what worked and what didn't – fire alarms, emergency exits, fire extinguishers, smoke detectors, sprinklers, elevators, stairs, sirens, lights. Consider every possible system and understand what worked and what didn't so that you can best communicate to everyone involved.

7. Dealing with the Press:

- Inform sister properties and rest of company in case they are approached for comments.
- Contact Grace Totty for a press release if needed
- Refer to supervisor for comments to the press
- Avoid making speculative comments to the press – don't guess or hypothesize about what might have happened. Use phrases like "we are working with the local authorities", "we are investigating what has occurred". Do not divulge anything further than this.

8. Payroll and Incentives:

- Payroll – keep track of both hourly and salary team members and compensate them for their commuting time if needed. For Baton Rouge, we compensated them for the drive to and from. This was easier for the hourly team members as we just added hours. For the salaried team members, we ended up paying an extra \$25/day as a bonus.
- Payroll – Compensate all team members \$25 /day as a bonus for volunteering to help and work in this situation. This is in addition to the \$25 for the salaried team members for their commuting costs.
- Core value coins – distribute to participating team members

Daily Walk Around

It is extremely important to walk your property daily to check for move outs, garbage, security issues, damages, etc. At least once a week an official Daily Walk Around Report should be completed, signed, dated, then scanned and submitted to supervisor. You will physically check off on every lock on every unit to guarantee the accuracy of our system, and to make sure there are no surprise problems. We should also use this time to ensure there is an appropriate number of ADA units available. This should be signed off on and emailed to your supervisor at least twice a week, once on Monday and once on Friday.

Computer Backup

It is recommended that the main property computer is backed up on a weekly basis. You can do this via One Drive or SharePoint. Please inquire with your supervisor or a trainer for more information.

Vacant Unit Locks

To prevent customers and non-customers alike from moving into vacant units, each property should have vacant unit locks. These locks are generally, inexpensive, colored (yellow is most common) pad locks that are keyed alike.



In certain cases, rent up properties may not have enough locks to lock up all vacant units. In this situation, please discuss the situation with your supervisor for guidance on this policy.

Company Units

The company maintenance unit should be clean and well organized. There should be adequate shelving and hooks to hold the tools and equipment. There should be a light and a receptacle. Extra supplies maintained here should be clearly labeled and easy to see to avoid duplicate ordering of items that are already in stock.

Cleaning Units

The inside of the unit's doors should be swept of debris, as well as the corners, walls, and ceiling if necessary. Sweep the floor starting in the back corner to ensure the entire unit is free of dirt and debris. Barrier pest spray should be sprayed around the unit, and along the door.

Pest Control

When a unit is vacated, the unit should be treated with the appropriate pest control materials (e.g., bait packs, glue boards, etc.). Additional pest control should be performed on an as needed basis. The supervisor must approve pest control used.

Door and Latch

The door should be examined for proper operation. Check the pull rope for proper length and integrity of the rope, if necessary, replace. Check latch for proper alignment and security.

Door Springs

As needed, lubricate the Door Springs (in roll-up doors) only with lithium grease. Spray the springs lightly with the lithium grease if the springs are rusting or squeaking.

Door Track

If the door track needs lubrication, then use Armor All sprayed onto a rag to lubricate the tracks. Avoid spraying the Armor All directly on the tracks as it will build up.

Door Alarm

If applicable, verify with the office that the door alarm is functioning properly and that the contact is not damaged. If a unit has a non-functioning door alarm it is NOT to be rented until functioning properly or approved by the supervisor.

Interior Lighting

If applicable, verify that the interior unit light is functioning properly, and the string is an acceptable length. Replace bulb or string if necessary.

Water Damage

Inspect the unit for water damage. If the damage is new and not previously addressed water damage, investigate the cause and do not rent the unit until it is corrected or determined to be inconsequential to a new tenant in the unit. Consult the supervisor whenever any water damage is discovered.

Landscaping

No heavy landscaping should be completed by property personnel, only by a licensed contractor.

Weeds are to be sprayed/ pulled as needed. Grass should be cut as needed during the summer.

Hedges and flower beds should be well kept and free of trash, dead plants, and weeds.

Watering should be performed as needed.



Maintenance checklist

To help organize and keep up with property maintenance, each property should have a Maintenance Checklist on hand. This checklist will include daily, weekly, monthly, and yearly tasks. This should be kept in a digital format on the property computer or in One Drive. Please see the following example of a maintenance checklist;

Property Maintenance Checklist



Task	Responsible Party	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Comments
Heating and Air Conditioning														
Change HVAC Filters - Office/Apt.	Vendor		X			X			X			X		
Change HVAC Filters - Climate Control Areas	Vendor			X			X			X			X	
Switch to/from Heat/Air	Manager				X						X			
HVAC Inspection/Service - Climate Bldgs Only	Vendor								X					
Check humidity in climate control buildings	Manager													
Visually inspect climate buildings for heating/cooling loss	Manager						X					X		
Fire/Sprinkler														
Test smoke detectors	Manager				X					X				
Fire extinguisher inspection/recharge	Vendor											X		
Sprinkler system inspection	Vendor													
Backflow inspection	Vendor													
Security														
Lubricate gate	Manager		X		X		X		X		X		X	
Test auto reverse	Manager			X						X				
Visually inspect camera pictures for clarity	Manager	X	X	X	X	X	X	X	X	X	X	X	X	X
Play back VCR/DVR to insure recording	Manager	X	X	X	X	X	X	X	X	X	X	X	X	X
Test office burglar alarm	Manager				X						X			
Inspect fence line for breaches	Manager	X			X			X			X			
Test door alarms	Manager													
Landscape/Lawn														
Seasonal flowers planted/mulch top dressed	Vendor				X						X			
Shrubs trimmed	Vendor				X			X			X			
Blow/sweep drive aisles	Vendor													
Sweeper service cleans drive aisles	Vendor													
Inspect exterior faucets for leaks	Manager		X									X		
Cut grass and trim edges	Vendor													
Spray weeds in asphalt/concrete cracks	Vendor													
Lighting														
Change bulbs	Manager													
Test motion detectors/timers (inside hallways)	Manager	X		X		X		X		X		X		
Test emergency exit lights	Manager						X							X
Verify photocell/timer on sign is working	Manager	X		X		X		X		X		X		
Verify photocell/timer on building lights is working	Manager													
Verify all exterior lights are working	Manager	X		X		X		X		X		X		X
Miscellaneous														
Clean gutter and downspouts	Vendor								X		X			
Clean roof drains	Vendor													
Inspect buildings for damage (vehicles, weather, etc.)	Manager		X		X		X		X		X		X	
Inspect interior faucets for leaks	Manager			X			X			X				X
Inspect toilets for leaks	Manager			X			X			X				X
Pest Control - Office/Apt.	Vendor													
Pest Control - Storage	Vendor/Manager													
Pest Control - Inspect for termites	Manager													
Visually inspect septic system	Manager													
Inspect asphalt and concrete	Manager						X							X
Count moving carts	Manager	X			X			X				X		
Wipe off roll up doors (hallways only)	Manager	X	X	X	X	X	X	X	X	X	X	X	X	X
Inspect golf cart - tires and cleanliness	Manager	X	X	X	X	X	X	X	X	X	X	X	X	X
Check golf cart batteries for appropriate water level	Manager	X			X			X			X			



Section Four – Customer Relations

The storage industry is very competitive because most facilities offer the same features and comparable rates. Many times, it will be the little things that sell your property to the prospect. Factors such as location, cleanliness, convenience, customer service and common courtesy will set you apart from the competition. Many people will even pay a higher price for better service.

The first step to good customer relations is making a good first impression.

The following are some important things to remember about your initial contact with a new customer.

Personal Appearance

Your appearance should follow the company dress code.

Gum chewing when working directly with the public is unprofessional.

Clothing that is too tight, too loose, or revealing is unprofessional.

Property Appearance

Walk across the street and take a good look at your property from a prospect's point of view. If there is something that would make you reconsider renting a unit from the property, do something about it.

Glass doors and windows should be kept clean and uncluttered. Avoid excessive signage and decorations.

The office should free of clutter.

Desks and counter tops should be neat and free of clutter, food, or beverages.

The Customer

Sales and rentals are the CORE of our industry. Therefore, it is imperative that we rent as many units as possible in order to meet revenue objectives and solidify occupancy.

Rentals are generated by leads, a person (referred to as a residential customer) or business (referred to as a commercial customer) who potentially wants what we have to offer.



Residential Customer

A residential customer can be defined as a person who stores general household or personal items. This is the most common type of customer. While the length of storage use will depend on the individual need, they typically rent from a span of 3 months-2 years.

Commercial Customer

A commercial customer can be defined as a company or professional that stores items directly pertaining to their business. Commercial customers are highly sought after as their average length of stay is 2+ years.

RENTAL LEADS

Phone Inquiries

These are customers who are calling around to compare prices. Always smile when answering the phone. A smile really can be heard in your voice. It is important that you understand that this customer is calling not only you but your competition. Therefore, it is imperative that we display excellent customer service skills over the phone.

Answer the phone with a greeting such as; “Good Afternoon and thank you for calling ABC Storage. This is Bucky, how may I help you today?”

Walk- Ins

These are prospective customers who walk into the office because they have seen either the sign or property from the road. Our tenant base is comprised of many walk-ins.

Internet

Web leads are customers who request information about your property based on information obtained from the internet. They are forwarded to both the property and the supervisor. Once you receive these leads via email, you are to immediately contact the prospective customer via phone or e-mail, per the customer’s preference. Web leads are easy sales that should not be overlooked.

Walk-ins

The next step in the rental process is the walk-in. Remember that you may have someone walk in who has not called before. This is your time to sell the customer on all the benefits of renting from your property. The process is outlined below.

- Stand up to greet him/her. It is a small gesture of civility that can make a subconscious impression. Also, it is always better to be at eye level with others when doing business.
- Introduce yourself and ask for the customer's name. Be friendly, polite, hospitable and professional. Use sir and ma'am. Be clear, concise and stay on topic.
- Ask a few questions to determine their needs. For example: "How many bedrooms do you have?" "Will you be storing appliances?"
- Ask the customer how soon it will be before he/she rents.
- Always offer to show the customer a unit based on what you have learned by asking questions.

Note: It is extremely important that you take the time necessary to show potential customer a unit. It shows that you are eager to earn his/her business.

As you are in route to the unit, use the time constructively. This is the best time to:

- Ask the customer how they learned of the facility.
- Point out the amenities of the property, such as keypad access, security cameras, lighting, wide drive aisles, etc.
- Find out how long they plan on storing.

While on the property, try to get the customer to commit to what size they will need. Asking questions such as, "Will this size suite your needs?" helps to determine if the size estimate that you have made is close to what is needed.

If the customer needs the unit immediately, tell them that it will only take a few minutes to complete the paperwork to get them into the unit.

Always invite the customer back to the office. This will allow you once more to attempt to close the sale.



Closing the sale- If you cannot get the prospect to commit, ask what it would take to secure the rental! Sometimes a sale can be saved by offering any concession previously approved by your supervisor (i.e. free lock, discount, etc.).

If the prospect does not commit to you and is checking prices/features for a future time, try to get some follow up information from them and record it on a PIP sheet. If they walk out without renting, they should, at the very least, leave knowing we want their business.

Phone Reservations and Leads Process

Since phone calls can sometimes be infrequent, we want to make the most of every call. This will ensure that you maximize the value of each call. Remember, the goal of the phone call is to get the potential customer to visit the property. You should follow up with leads ASAP.

1. Each phone call should be recorded using Reservations Tab.
2. Each day sometime after opening your property, go into the Reservations Tab and check to see if any potential tenant needs to be followed up.
3. Make a courtesy call to each customer for which you have a Reservation for. The call should probably go something like this: "Hi, Mr. /Mrs. _____, this is _____ from _____ Self Storage. We had a note here that you need a storage unit on the ___th. I just wanted to follow up with you to see if I could help in anyway during your move."
4. You might find that the potential customer called a couple of other storage facilities after they talked to you. You can then resell your property to the potential customer. If the customer rented elsewhere, you might be able to find out why. This could be beneficial for selling your property in the future.

Mystery Shops

To ensure ongoing quality of our customer service, your property will be 'shopped' once a quarter. The following is a breakdown of what you will be graded on and the points awarded;



MYSTERY SHOPS – CHEAT SHEET

Always have an “I WANT YOUR BUSINESS” attitude

ALWAYS STAND AND INTRODUCE YOURSELF – Greet them with a WARM smile, shake their hand

(Total points 20 = Greet 5, Stand 5, Warm Smile 5, Introduce yourself 5)

Ask potential tenant for their name (5 points)

Determining the size of unit needed: Ask 5 questions: (Total points 5 3=3, 5=5)

Ask what all you are planning to store

Ask do you have any major appliances you will be storing

Ask if they need access to the back of the unit after storing

Ask if they have a tool shed or garage items to storage in addition

Ask if they will be adding additional items to unit while storing

Ask potential tenant how long they will be storing for (5 points)

Ask potential tenant how soon would you need the unit (5 points)

Give potential tenant your recommendations

(example: Based on what you told me you will be storing I suggest XYZ size climate or non-climate control)

Make a soft close “Does this sound like it would meet your needs? (5 points)

Invite potential tenant if they would like to view the unit/units (5 points)

While walking to unit/units make small conversation with potential tenant

a) Have you ever used storage before?

b) How did you hear about ABC Storage?

c) Point out the amenities of ABC Storage (example: Digital recording, police patrol, clean facility, month to month rental agreement, friendly staff)

(Total points 5 1=1, 3=2, 3=5)

d) Let them know about office hours, gate hours and access hours



- e) Tell them about specials (example: \$25.00 off w/Auto Pay - Pay 6 mths get 7th ½ off - Pay 12mths get 13th Free)
- f) Tell them about the Administration Fee, let them know that is a one-time fee that is charged at the time of rental
- g) Let them know they must provide their own lock; we do sell them they are XYZ cost. (5 points)
- h) Let them know Insurance is MANDATORY but ABC Storage give you the 1st month free after that it will be \$9.00 a month for \$2000 coverage (5 points)

Showing Unit

- a) Let them know the size you are showing them (The unit I am showing you is a XYZ and based on what you told me you would need to store I believe this size will work. Ask potential tenant their option on the size you are showing them if they are questionable let them know how they can pack the unit or offer to show next size up or down.
- b) Don't forget to up sell retail (storing a mattress – need mattress covers, etc.) (5 points)
- c) Make sure you show them how to properly open and close storage door (example: pressing down on handle to open door, making sure latch is all the way over to the right before placing lock on unit)
- d) Invite them back to the office to close the sale (5 points)

While walking back to office make more small talk

- a) We have a great referral program – explain the referral program to potential tenant
- b) Let them know if you offer rental trucks – (We offer U-Haul trucks for your convenience) (5 points)

If potential tenant is unsure if they are ready to rent let them know you can hold a unit for them for a period of time, make sure you let them know you only have XYZ available of that size. (5 points)

If the tenant insists on leaving without renting a unit, make sure you add their info in to the reservations tab to follow up in Door Swap. Give them a brochure with prices, your card, and thank them for visiting with you today.

Complaints

It would be unrealistic to expect 100% of your customers to be happy and satisfied 100% of the time. You will occasionally have to deal with an unhappy customer. Sometimes a customer will be downright angry. When a customer has a complaint, you should:

- Listen to what they have to say without interruption to determine if the complaint is legitimate. You may even need to make notes or take photos so that comments can be added to the customer's file later. If possible, try to resolve the situation within the scope of your authority. If you are unable to satisfy the customer, refer the situation to your supervisor as soon as possible.
- Determine the best way to remedy the complaint. In some instances, this may be as simple as performing some minor maintenance (i.e. replace light bulb). In other cases, we may need to hire a moving company to move someone's belongings into another unit (i.e. roof leak).
- Ask the customer if the proposed solution meets their approval. If it does, go ahead and arrange for the complaint to be remedied. If it does not, consult your supervisor for help in figuring out what is an appropriate remedy for the complaint.
- If the problem that resulted in the complaint is determined to be our fault, we should give the customer some type of compensation for their trouble. The compensation should be fair in relation to the seriousness of the problem. This can include a discount off next month's rent, a free lock; use of move-in truck, etc. The limit on this type of compensation should be one month's free rent. Anything more than this needs ASM supervisor approval.
- If the customer does not feel that the complaint has been adequately addressed and they want to speak to someone "higher up", you should obtain their name and contact information which is to be communicated to your supervisor. Tell the customer that they will be contacted by an ASM supervisor within 24 hours. NEVER give them the ASM supervisor's phone number.

It is always important to remember that we are in business because of our customers. Sometimes, we may want to resolve a complaint, even if it doesn't



appear legitimate. This is done in situations where there is no clear answer as to who is responsible, or we do not want to appear lacking in our response

*Always be straightforward and honest when dealing with customers, primarily when explaining terms of the lease, and always explain the terms of the lease.

*Never promise a customer something you do not have the authority to approve.

ASM utilizes an 'up-to' policy for resolving complaints based on your position. This is a guide on how much you can give to rectify a situation without involving your supervisor. This will need to be explained to your supervisor afterwards. Limits are as follows;

PT AMs – Up to ½ month's rent

PMs and FT AMs – Up to 1 month's rent

GMs – Up to 2 month's rent

Customer Information Privacy Policy

At no time, should any customer information of any type be disseminated in any form or fashion to anyone. This would include but is not limited to the customer's name, address, phone number, email, unit number, date of birth, social security number, credit card information, or any other customer specific piece of information.

Military ID's, and Common Access Cards (CAC) are not to be copied at any time. For discount verification purposes, the card can be viewed, and the ID number only can be recorded in the property management system.

The privacy and security of our customer's personal information is very important to us.

- We do not sell our customers personal information to third parties for any reason.
- We do not disclose our customer's personal information to unaffiliated third parties.

Violation of this policy may result in immediate termination and could result in legal action.

Use of Customer Credit Cards

It is against ASM policy to charge a customer's credit card without having the appropriate authority. To process a payment using a customer's credit card through Auto Pay, we must have the following two items in our possession:

1. A signed 'credit card authorization form'
2. The customer's explicit request and consent for the transaction to occur

Failure to abide by this policy will result in termination.

Marketing

Marketing is systematic planning, implementation, and control of a mix of business activities to gain customers. Advertising is a component of marketing that consists of getting the word out concerning your business, product, or services. We advertise to attract customers now. We market to attract customers later. Both are important.

Keep in mind that most of your business will usually come from within a five-mile radius of your property. Also, remember that self-storage can be marketed to businesses as well as residences.

*As a best practice, try to build a good rapport with your local merchants by doing business with them whenever possible.

It is required for all properties to have a brochure holder/mailbox placed in a visible location outside the office. A small amount (5-10) of brochures, with prices written in, should be placed in the holder. This will ensure that potential customers who visit the property, but for whatever reason do not talk with a manager, will still be able to take information with them. This will increase the chance that the potential customer will ultimately rent from us.

Below is a list of different target markets and some tips for reaching them;

Single Family Dwellings - This is probably the most difficult prospect to contact, simply because you can't make direct contact. There are several ways to bring the prospect to you, however. Referral Cards are probably the best way to reach

single family dwellings. When a friend or family member recommends a place of business, and a discount is included as well, you are almost guaranteed a rental.

Real Estate Agencies – An excellent way to spread the word about your facility. You may want to consider contacting a couple of agents in your area and offer to give out their business cards to your customers, in exchange for them referring you to their customers.

Chamber of Commerce – Chambers of Commerce have several events a year. Some of the events sponsored are good places to meet members of the community and hand out business cards. There are also Chamber sponsored direct mail programs, some of which may work in certain areas, although ideally, any direct mail marketing should be postal code specific.

Spring and Fall Yard Sales – A well planned yard sale can be a great way to meet your neighbors and get to know your customers. Your only responsibilities should be advertising the sale and clean up. There are a few things you should remember. Advertising is usually available at little or no cost. Have the yard sale in full view of the street. Make it clear to your customers that all commerce must take place outside the building. For security reasons, you really don't want a lot of people milling in and out of units. You should also make it clear to your customers that they will be responsible for their tables, their goods, and their money. Mark off the area reserved for tables. You may want to set up a table for the property and clean out the property unit. You can also have refreshments if you like. Hot dogs and soft drinks are easy and inexpensive, and always appreciated.

Apartment Complexes - You should make regular visits to the apartment complexes in your area. Build a rapport with the manager by supplying candy for the office, pens, cookie baskets, pizza, etc. Ask for permission to leave business cards, coupons, flyers, etc. for the residents.

Doctors' Offices and Clinics - State law requires that clinics and doctor's offices keep all patient files for a specified amount of time. Think about drafting a letter and sending it to all the doctor's offices within a five-mile radius of your area. Make the letter to the attention of the office manager. Be sure to offer an attractive special/discount.



Universities - A visit to a nearby university could result in several rentals. Students leaving the dorms during Christmas and summer breaks must take everything with them. Student specials are an excellent way to fill small units, and students are repeat customers. Be sure you obtain permission from the admissions office before proceeding.

Churches - Consider offering a free or discounted unit to one or two of your area churches in exchange for advertisement in their bulletin.

Military Installations - Advertising a 'military discount' to your local military base is a great way to promote your facility. Military personnel generally make good customers because they follow the rules and pay their bill promptly as they are prime candidates for auto pay.

The ideas listed above are just a few. With a little research, you will find that there are many market segments. With a little thought and brainstorming you will find there are a variety of ways to market and advertise your property. Attempt them all and utilize the ones that work.

Occupancy Based Marketing Plan

Each property must complete a marketing plan monthly and turn it in to their supervisor by the 15th each month for the following month. The plan is adjusted by your occupancy level, which will determine the intensity of marketing required. This Excel packet is your one stop warehouse for marketing tracking. You will plan out who to see, when to see, and how to create a storage need.

How to use

1. Fill out the MARKETING CONTACTS tab with your local business types and contacts - update as necessary. Use the Local Presence Spoke to identify different high return business types
2. Configure your monthly marketing tabs to distribute marketing responsibilities for different business types. Grouping your weekly marketing by business type will help you tailor you marketing strategy to create a need for storage in various



business types. Alternating in Person and Email/Call connection types monthly will allow you to keep in touch with various contacts and save on out of office time

3. Alternate Online Presence focus to monitor and update property image and online footprint. Use the Online Monitoring Examples to identify different ways to market online.

Online Marketing

Properties may use various online ads to help drive traffic to the facility, as well as the use of aggregators. An aggregator is a third-party site that advertises a special deal in order to send tenants to use for a small percentage of the rental cost. Examples of these will be Storage Front or Spare foot. We also use third party sites such as Signpost to generate online reviews. Review generation is extremely important to online marketing.

Website

To maintain our marketing presence, it is important to keep our website up to date. This includes updating pictures, property hours, and specials as well. Please reference the external training videos to guide you through the process of updating all aspects of the website.

SMC

Our Social Media Coordinator helps with your online presence. Primarily focusing on Facebook, our SMC will keep engaging material coming from your property in the form of social media communications. It is important to keep the SMC updated on any property updates, including everything from events to specials to hour changes.

Creative Blend Design

ASM uses Creative Blend Design to purchase all our printed marketing materials including signs, business cards, brochures, pens, etc. Make sure you keep a good mix of marketing materials at your property, as well as ensuring all your signs stay updated and accurate. To order these materials visit

<http://www.asmordering.com/asmordering>. Make sure any purchases are approved by your supervisor before ordering.



Target Market

At each move in of a new tenant, a series of marketing questions are asked so we can identify our target market. The information collected by the questions is put into a report called the Marketing Survey Report which can be ran in DoorSwap. This will break down who your tenants are, where they live, and how they heard about you as well as other useful information. See sample first page of report below;

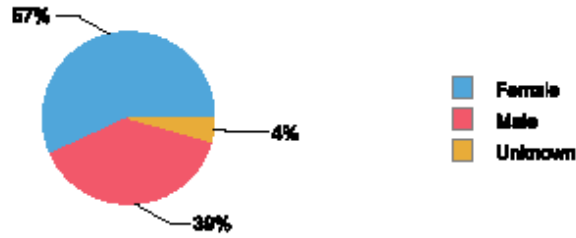


Marketing Survey
July 10, 2017 02:19 PM EST
As of: Jul 9, 2017

Created by: Test Staff (AP, Acct)
Company: DoorSwap Test Company
5811 Test Street Wilmington NC 28405

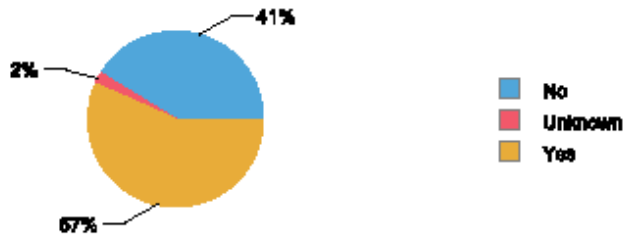
DoorSwap Test Company

Gender

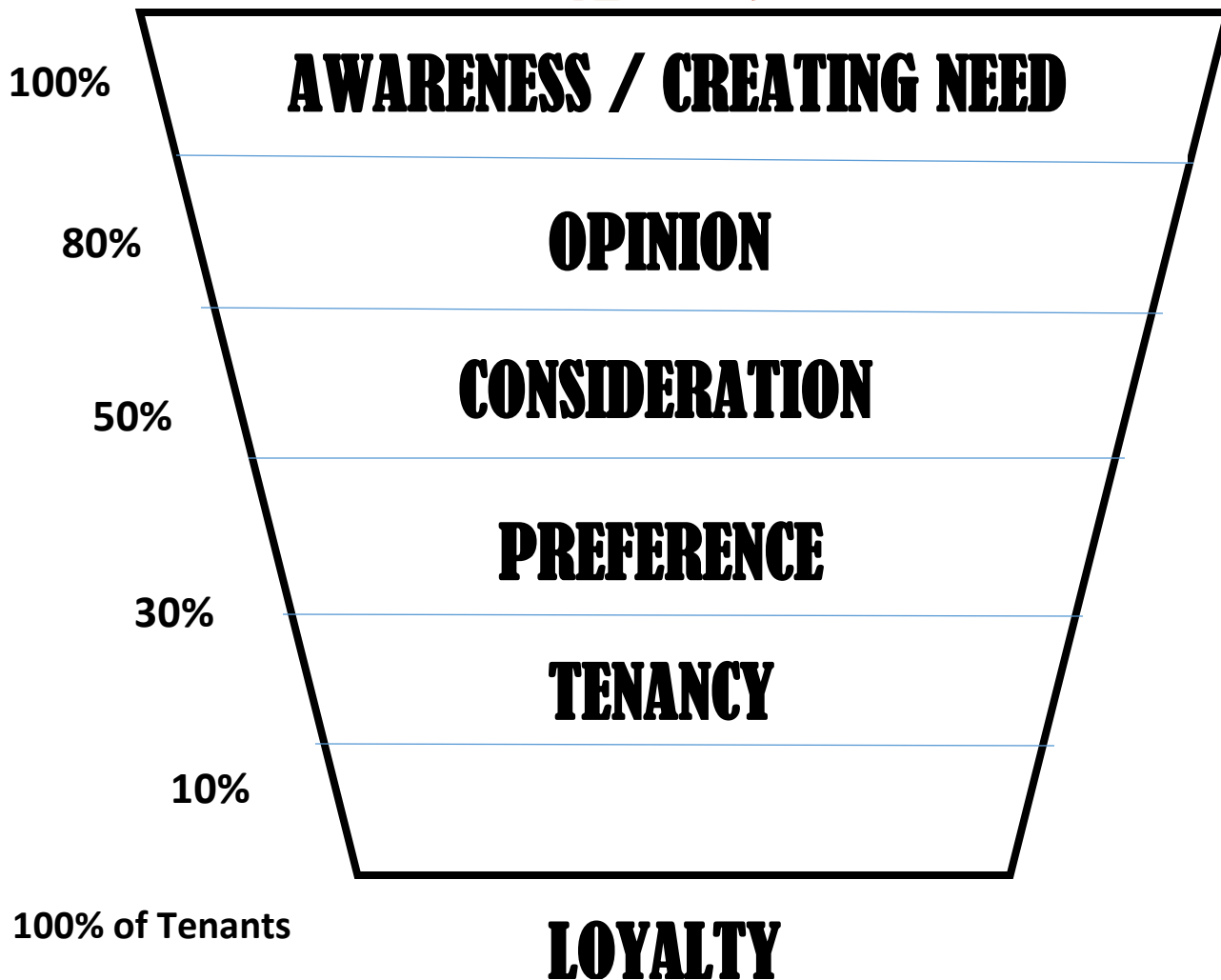


Female	103	57%
Male	70	39%
Unknown	8	4%
	<u>181</u>	

Have you used self storage in the past?



No	78	41%
Unknown	4	2%
Yes	107	57%
	<u>189</u>	



Awareness / Creating Need – This is the first step in acquiring new tenants. People must know you exist in order to want to store with you. Target a wide variety of potential tenants in hopes of creating a need for storage, not just targeting those that we know need it.

Opinion – Once potential tenants are aware of our existence, and acknowledge that they might need storage, we need to create a positive opinion of ourselves in their eyes. This could be asking a nursing home if there are certain items they need rather than bringing candy in or showing younger people that we are tech and social media savvy. This should account for 80% of people initially reached.

Consideration – At this stage we should be reaching about 50% of potential tenants originally targeted. They will be coming in or calling to find the best



facility to fit their needs. Here is where customer service and facility cleanliness come in to play.

Preference – After the initial contact with the potential tenants, about 30% of the original number should prefer us over other facilities. This is accomplished by impressing them since our very first initiative. It is now important to follow up with them, ensuring them we want their business.

Tenancy – 10% of potential tenants should now be tenants! Success! Your work is not over yet.

Loyalty – All of your tenants should be loyal to our facility and company as a result of your continued excellence in service. This will drive long term tenancy as well as direct referrals to their friends and family.

Referral Program

ASM has a huge focus on our \$50 referral program. A large percentage of our tenants come to us via word of mouth advertisement, so to help encourage more of this we incentivize those who promote us. Please keep stickers, wall decals, and stamps at your property to promote this program. To avoid any scamming on this program please remember two rules;

1. We will only pay out referrals when a full month payment is made by the new tenant. This prevents people moving into a unit with the first month free then moving out before the second month and your property paying out \$50. To avoid confusion, make sure everyone is told when they put down a name for referral that it will not be paid out until a full month payment is made.
2. Have all referral checks mailed to your property. You will put in the payment request into DoorSwap as an invoice into payables. You will put the person's name to receive referral and your property address. You will then call said person once the check arrives to pick up at your property.

Rate Management

To stay competitive in our market, we must periodically adjust our street rates and our tenant rates. To adjust our street rates, first we will complete a Spectrum Rate Survey. These are to be completed monthly, reviewed weekly, and submitted to your supervisor by the 15th of each month. To complete the Spectrum Rate Survey, you will sort all the facilities based on your biggest competition and down, then collect data from them for rates, occupancy, and specials offered. To adjust in DoorSwap you will click 'Financial Setup' from your dashboard. Then select 'Billing Plans'. From here select the size unit you want to change the price on, then click 'Edit Billing Plans'. Finally change the price and click save.

Street rate increases not only allow us to make more revenue from new tenants, these increases allow us to complete Tenant Rate Increases. Tenant rate increases are how we bring our current tenants' rates to the current street rates. This is done by first running the 'Revenue Rule Occupied' report in DoorSwap to see the gaps that exist between tenant rates and street rates. From here you can select specific tenants to raise their individual rates. To do so, select the tenants account, then click the 'Lease' tab at the top of the customer window. From here select the unit in which you want to raise the rate on, then click 'Edit Billing Plan'. Scroll down in the pop-up window to 'Add Adjustment', then enter the new price and click save. Make sure you give yourself enough time to mail their adjustment to where they will receive it 30 days before the adjustment is active. The letter will then generate in DoorSwap under the 'Print Jobs' section.

Reports

There are multiple reports that must be turned into your supervisor each month. Most of these have been discussed in other sections of this manual. The following are the names and due dates of these reports. Make sure these are always sent in by their due dates to ensure your facility is operating at full functionality.



REPORT DUE DATES

Reports to be turned in **EVERY MONDAY** and the last day of the month

- **Touch base report**
- **Completed Cash count from previous week**
- **Detailed walk through (Every Monday and Friday)**

Reports to be turned in by the **5th** of the month

- **Incentives sheet.**
 - Property is to send completed incentive sheet for the previous month.
 - Property is to send the incentive sheet for the current month to be approved by the supervisor. Each month during the supervisor property visits you should discuss briefly the focus for the next month's incentives. Do not wait for the supervisor to create your incentive report.
- **Commission** - truck and or any other form of commission the property has in place.
- **Mileage Reimbursement – turn in your regular miles for reimbursement.**
 - Traveling for training or coverage out of town is to be turned in by the 5th of the following month. Consult your supervisor on when to turn in those “out of the ordinary” situations
 - When a property is leaving the ASM portfolio miles should be reported quickly. Consult your supervisor on when to turn in those “out of the ordinary” situations.
 - When exiting ASM employment your miles should be turned in quickly. Consult your supervisor on when to turn them in.

Reports to be turned in by the **15th** of the month

- **Spectrum Rate survey** is to be completed and sent to your property supervisor



- **Marketing plans** for the following month should be planned, scheduled and a copy sent to the property supervisor.

Reports to be turned in by the **25th** of the month

- **Property schedule** for the following month should be established by the 25th. The schedule should be entered in the outlook calendar and shared with the property supervisor. If your property does not have this ability, email your schedule to the property supervisor. Send any unique scheduling issues to the property supervisor as quickly as possible.
- **Maintenance Checklist** for the previous month, completed with all completed maintenance, and needed items for the future.

Special Case Situations

Pre-Leasing

There are two main times that we pre-lease storage units. The first is when we are anticipating the opening or expansion of a property. Since we have units available, it is not necessary, and sometimes not possible, to put customer information into the property management system.

The second circumstance that lends itself to pre-leasing occurs at properties that have a heavy student population in the immediate geographic area. If a potential student customer calls and requests to “reserve” a unit we should follow the steps outlined below.

- The potential customer should come in within 15 days of their call to sign a lease for the future date.
- We should take a credit card over the phone at the time the customer asks for a reservation. If the potential customer does not come in within the 15 days, we will charge their credit card \$10.



- A list of customers who have pre-leased will need to be kept separately (outside the property management system).
- If the customer comes in, they will be charged from the date they indicated needing storage.
- If the customer does not come in, the unit is released back into the available unit's inventory.

In most cases, we would not want to pre-lease to the point of occupying 100% of any unit size. You will want to discuss specifics of your strategy with your supervisor. Once you stop pre-leasing due to gaining occupancy, you will most likely want to force future customers to rent immediately or risk not having the unit available when they need it.

The mechanics of pre-leasing in every property management system is different. You will want to review the specifics of your system with your supervisor.

Approving Time

Please ensure that you're approving the time of anyone under you at your properties. This includes ensuring the time worked matches the time entered Alpha staff and all sick time/vacation time is entered correctly.

Bankruptcy

Customers who have filed bankruptcy may voluntarily pay their bill, but if they do not, you are not allowed to call them and request payment or auction their unit off, as they are under the protection of the U. S. Bankruptcy Court. Past due balances accrued prior to the date of bankruptcy filing must be written off, unless the customer voluntarily pays the bill. REMINDER: Do not do anything regarding the tenant's account if you have received a bankruptcy statement.

The following steps should be taken when dealing with a bankruptcy:

- 1) Call your supervisor to discuss the account.
- 2) Do not call the customer.

- 3) Call the bankruptcy trustee and be persistent in asking them to have the customer come and clean the unit out immediately. In most cases, having the customer vacate the unit is our best remedy. Call the trustee weekly.
- 4) Call the debtor's attorney and ask them to do the same as you did with the trustee.
- 5) Consider filing a "Motion to Lift Stay" with the bankruptcy court. Discuss this option with your supervisor. The cost is usually around \$150. Generally, we can file the Motion to Lift Stay ourselves, but hiring an attorney may be a better option in some cases. An approved Motion to Lift Stay will allow us to proceed with foreclosure procedures, eventually allowing us to auction the unit.
- 6) Generally, bankruptcy filings provide relief from past due balances accrued before the initial filing date. Charges accrued after the filing date can sometimes be recouped. Discuss this point further with your supervisor before proceeding.

Each state has its own probate laws. You should check with your supervisor before allowing any family member access to a deceased customer's unit.

Military Tenants

If a tenant is active military and is deployed, we cannot auction their possessions. Be sure that you ask tenants if they are active military, and if so, enter so into Door Swap and ensure that this info was added to the lease upon move in or update. If a tenant becomes active military during tenancy, do the same. In either case make sure you check a military ID for proof, but do not make a copy of or scan the ID.

Conflict of Interest

Team members and their immediate family (i.e. spouse, parents, and siblings) are not allowed to bid on any foreclosure units. We strongly discourage anyone outside of family members, who are close to the team member, from bidding. Since the previous statement is somewhat vague, the best piece of advice is that you should not allow someone to bid if you think there is any chance that it could be construed that a person had information about a foreclosure unit before the



other bidders. This creates a potential conflict of interest. Violations of this policy are punishable with disciplinary action, up to and including termination.

Due to the legal nature of lien sales, it is extremely important that all steps in the checklist be followed strictly. It is also very important to make sure that all regulations listed in the operations manual and any supporting documents pertaining to foreclosure/lien sales are taken seriously and followed strictly. Failure to perform any procedure properly, which is associated with the foreclosure/lien process, will result in disciplinary action, up to and including termination.

ASM Visits

There are frequent visits from your supervisor, corporate, owners, and investors to your property. These visits are not typically announced. As you should always have your property in good working order, you should also keep a knowledge of why your property is performing in the manner that it is in case questions are asked. Just stay knowledgeable, and do not hesitate to ask questions so you can learn. We want to see every team member succeed, and will offer the tools for

Trucks

Some facilities have a property truck, and others may have U-Haul or Penske. As the procedures for each of these varies, please reach out to a local rep to complete training on their procedures. We expect each team member to follow these companies' policies, just as we expect you to follow ours.