

## Thursday, November 7

\*Subject to change

9:30am – REGISTRATION OPEN – Ballantyne B Foyer

9:30am – 11:00am - TRADE SHOW SETUP- Ballantyne Ballroom

11:00am – 1:00pm –TRADE SHOW open (Lunch at 12:00pm)- Ballantyne Ballroom

1:15pm – 2:00pm – CONCURRENT SESSIONS

### **Concurrent #1 – Overlook Room - What Makes Them Click Rent? – Tommy Nguyen, StoragePug**

You've heard a lot about needing to drive traffic to your website through things like SEO, digital ads, blogs, or even social media to be successful. You've probably also heard a lot about automation, being unmanned, API's, and remote management. These things matter - they provide value to your business - when the people who land on your website make that almighty decision to use the website. How do you make sure your storage business is successful online? How do you make sure you're converting traffic into rentals. In this session, we'll cover:

- Features of a website that convert online traffic.
- How to establish trust with potential customers.
- Educating to help sell your product to potential customers.

### **Concurrent #2 – Carolina - Bridging the Gap: Solving Field Pain Points in a Remote World - Jackson Stevens, SpareBox Technologies**

As more owners and operators move towards hub-and-spoke, remote, and virtual operations, unanticipated pain-points emerge. Email escalations get lost, a lack of visibility into the field surfaces, and customers' complaints seem to rise. All of this might encourage an owner to U-turn and retreat back to traditional store managers. Or, a new playbook appears to boost financial performance and enhance the customer experience. Learn about best practices in marrying field and remote customer operations, operational automation, leveraging technology, and fine-tuning your operation.

### **Concurrent #3 – Fairway Ballroom B - Navigating the Financing Maze: Avoiding Pitfalls in Self-Storage Facility Funding – Anna Taylor, Live Oak Bank**

Securing financing for your self-storage facility is a critical step in turning your vision into reality. However, navigating the complex landscape of financing options can be daunting, and making the wrong decisions can have costly consequences. In this informative presentation, we'll delve into the common mistakes to avoid when seeking financing for your self-storage venture. From understanding different financing options to optimizing your financial strategy, attendees will gain valuable insights to help them make informed decisions and secure the funding needed to succeed in the self-storage industry.

2:00pm – 2:15pm – Break

2:15pm – 3:00pm – CONCURRENT SESSIONS

### **Concurrent #1 – Overlook Room - Winning Customers: Mastering Sales in Self Storage Management – Lou Barnholdt, Universal Storage Group**

Unlock the secrets to winning more customers and dominating the self-storage sales game with this session. Learn how to attract potential customers to your site through effective marketing strategies and online presence. Discover the best practices for treating customers when they arrive, from creating a welcoming environment to understanding their needs. We'll delve into the critical questions to ask that reveal their pain points and how to position your facility as the ultimate solution. Effective follow-up is key to maintaining customer relationships, and we'll provide you with the techniques to stay engaged from the first call to long after they leave. As a store manager, your role is not just about

managing operations but about being a supportive presence for your customers throughout their entire journey. Join us to master these sales techniques, build lasting customer relationships, and drive your facility's success. Your role is crucial, and we're here to help you excel in it.

**Concurrent #2 – Carolina Room - The Intersection of Revenue Management & Lead Conversion – Matt Engfer, Cubby Enterprises**

This session will focus on how to optimize the renter journey for more conversions at higher rates across the web, phone, and in-person with a focus on e-commerce best practices and cutting edge revenue management practices.

**Concurrent #3 – Fairway Ballroom B - Understanding Your Data: How to Collect, Analyze, and Make Your Data Actionable – Mason Levy, swivl; Andrew Capranos, 10 Federal; Melissa Stiles, Storage Asset Management; Lynn Sykes, Storage Asset Management**

In today's fast-paced self-storage industry, the ability to effectively harness and leverage data is crucial for driving business success. This presentation will delve into the journey of data from collection to actionable insights, showcasing how technology can empower your business to achieve continuous growth. Discussion Points:

- Best practices for collecting and managing data within your day-to-day operations.
- Identifying key data sources and integrating them into your operations.
- Techniques for analyzing data to uncover trends and opportunities.
- Strategies to make data actionable and drive business efficiencies.
- Combining marketing and operational data to enhance the customer experience.
- Real-life examples of data-driven decision-making in self-storage

3:00pm – 3:15pm - Break

3:15pm – 4:00pm – CONCURRENT SESSIONS

**Concurrent #1 – Overlook Room – Crushing Customer Objections in Self Storage – Stephanie Tharpe, A+ Management Group**

In the current dynamic of AI, remote locations and the removal of real people at storage facility offices, the art of customer service may be getting tossed to the wayside. Self storage managers are frequently challenged by customer objections during the entire time of the rental term. In this session, you'll learn how to redirect challenges to price, insurance requirements, administrative fees and other sticking points to increase your customer conversion rate. We'll cover:

- What is old fashioned customer service?
- How to be confident in your product and services.
- How to compete against the facilities that have no one on site.
- How to overcome pushback on rate increases.
- How to be aggressive in generating positive reviews.

**Concurrent #2 – Carolina Room - Wealth Strategies for Self Storage Owners – Charlotte Burnett & Katherine Trainor, JP Morgan**

The goal of the session is discuss wealth planning strategies for real estate professionals, specifically owners. Why is this important? The large creation of wealth overtime can often result in unexpected tax issues. In addition, many business owners spend so much time focusing on building the business and they don't think about their personal balance sheets or succession. This session is meant to serve as a starting point to think beyond the day to day business and how you can build a legacy. Topics covered include:

- Overview of Estate and Gift Tax System
- Payment of Estate tax of Illiquid estates
- Governance

- Making Gifts to minimize estate tax liability
- Sale of a Self-Storage Business

### **Concurrent #3 – Fairway Ballroom B - RV and Boat Storage: Navigating Challenges and Opportunities – Sydnie Wilda, The Storage Manager**

Vehicle storage facilities face several challenges, including the need for significant land and capital to accommodate large vehicles like RVs and boats. Navigating complex zoning laws and environmental regulations, which vary by region, can be difficult, especially since many municipalities classify these facilities as parking lots rather than storage spaces. Security is also a major concern due to the high value of stored vehicles, requiring advanced surveillance and gated access. Maintenance needs vary depending on the type of facility, from gravel lots to Class A buildings, leading to ongoing costs. The market is still evolving, and there is uncertainty about why some facilities outperform others in the same market. We'll discuss these challenges and opportunities of offering RV and Boat storage.

4:00pm – 6:00pm - TRADE SHOW with COCKTAILS – Ballantyne Ballroom

6:00pm – 7:00pm - Trade Show Break Down

## **Friday, November 8**

\*Subject to change

8:00am – REGISTRATION OPEN – Ballantyne B Foyer

8:00am - 9:00am – BREAKFAST- Ballantyne B Foyer

9:00am – 10:15am – **WELCOME/HOF/GENERAL SESSION – Ballantyne Ballroom**

**Keynote Speaker: John Chang, Marcus & Millichap**

Join John as he shares his outlook for the economy and its implications for self storage in his keynote address. He'll share factors that will shape our industry in the coming years, based on substantial market research for the sector, and share emerging trends in the self storage.

10:15am – 10:30am – Break

10:30am – 11:30am – **LEGAL/LEGISLATIVE SESSION - Ballantyne Ballroom**

Joe Doherty, Self Storage Association: Legal/Legislative Update and Emergency Preparedness

11:30am – 11:45am – Break

11:45am – 12:45pm – **ROUNDTABLES/CLOSING GENERAL SESSION – Ballantyne Ballroom**

12:45pm – Meeting adjourned