



REGIONAL MANAGER

Academy

Easy. Clean. Service.

manhattan mini storage

Store Management Training

Academy

1. **Trainer** - Training Manager: _____
2. **Location** - Training Store: _____
3. **Course length** = 4 days _____

DAY 1-4:

WEEK

1

REGIONAL MANAGER

Notepad

Academy

This is a good place to write down your logins, questions etc.



Lined area for writing notes.

Notepad (continued)

Academy



Regional Manager Training with Training RM

[Training Region]

Academy

DAY 1:

WEEK

2

Weekly Objectives:

- | | |
|--|--|
| <input type="checkbox"/> Customer Sales Principles | <input type="checkbox"/> Delinquency Management |
| <input type="checkbox"/> Understanding KPI's | <input type="checkbox"/> Incidents and Claims |
| <input type="checkbox"/> Inventory IQ | <input type="checkbox"/> Store Reviews and Scorecard |
| <input type="checkbox"/> Asset Integrity and Capex | <input type="checkbox"/> Invoicing |
| <input type="checkbox"/> Revenue Management and Rent Increases | <input type="checkbox"/> Teams and File Sharing |

Daily Objectives:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Meet and Greet with Training RM | <input type="checkbox"/> Credits |
| <input type="checkbox"/> Rental Manager Review | |
| <input type="checkbox"/> KPI Review | <input type="checkbox"/> Inventory IQ |
| <input type="checkbox"/> Google Reviews | <input type="checkbox"/> Vacate Queue |

Meet and greet with Training RM (1 Hour)

- ☐ Discuss Questions/Concerns from Week 1 Store Manager Training with Training RM
 - ☐ If RM Trainee did not pass certification test, give opportunity to retake
- ☐ Discuss Objectives of RM Training and review full Training Timeline

Regional Manager Training with Training RM

[Training Region]

Academy

DAY 1:

WEEK

2

Rental Manager Review (1 hour)

- ☐ RM Review frequency should be based on Home Office Reviews and KPI Performance
- ☐ Review Tableau 1st Call Report and Discuss Importance of never completely missing a 1st call.
- ☐ Review 5-10 Bookings from a store with focus on: **Actions, Calls and Notes**

KPI Review (1 Hour)

Discuss KPI Goals Using the Tableau Score Card Reporting

- ☐ Closing: RIN 95%, RINO 70%, Leads 35% (Emphasize Sparefoot)
- ☐ Upgrades: Walk In 60%, SRC 60%, Web 35%
- ☐ VCP Sales at Check In: 90%
- ☐ VCP Tier Sold: Less than 50% of plans sold are the lowest plan
- ☐ KPI Goals are measure by trailing 4 Weeks

Review Operations Dashboard for the same KPI to show store level reporting

Google Reviews (30 min)

- ☐ Goal: 25% of rentals (IE. 100 Rentals = 25 Reviews)
- ☐ Discuss positive impact of consistent new reviews
- ☐ Reinforce use of QR codes to gain reviews at the time of rental

Regional Manager Training with Training RM

[Training Region]

Academy

DAY 1:

WEEK

2

Credits (1 Hour)

- ☐ Goal: \$0.40 per Occupied Unit
 - ☐ Review **Credit per Occupied Unit** in the Operations Dashboard
- ☐ Review and Explain the Purpose of 4th Credit Report
- ☐ Discuss impact on revenue and customer management of giving credits
- ☐ Credit notes and Note Headers (CREDIT, COLLECTION ATTEMPT, INCIDENT)

Inventory IQ (30 min)

- ☐ Review Unavailable Units, Company Unit Locations and Correct Unit Status
- ☐ Discuss impact on revenue and Revenue Management Algorithm
- ☐ Store should review weekly
- ☐ RM should review 10th and 25th of the month (Bi-Weekly)

Vacate Queue (30 Min)

- ☐ Review vacate Queue and Pending Vacate Report
- ☐ Discuss 15 Day Notice Condition of Lease
- ☐ Discuss that store walk throughs and lock checks should match vacate tracking
- ☐ Discuss Data Tracking of pending vacates in relation to pricing, occupancy, and Revenue Management
- ☐ Vacate Queue should be reviewed the First and Last Week of each month.

DAY 1 (1 hr)
RECAP

Reinforce core principles of a successful asset integrity visit: KPI's, Customer/Unit Management, Customer Service, and documentation

Allow RM in Training to revisit areas of priority/opportunity for them from today's training

Regional Manager Training with Training RM

[Training Region]

Academy

DAY 2:

WEEK

2

Daily Objectives:

- | | |
|---|--|
| <input type="checkbox"/> Asset Integrity Review | <input type="checkbox"/> Asset Integrity Visit Recap |
| <input type="checkbox"/> Curb Appeal/ First Impressions | <input type="checkbox"/> Asset Integrity Visit Recap |
| <input type="checkbox"/> Office | <input type="checkbox"/> Competition/ Revenue Management |
| <input type="checkbox"/> Store Walk Through | <input type="checkbox"/> Day 2 Recap |

Asset Integrity Review (4 hours)

- ☐ Ideal store should be an example of StorageMart Brand promise and highly organized
- ☐ For efficient training, the ideal store should be a Tier 2 or 3

Curb Appeal/First Impressions

- ☐ View Entire Perimeter of the Store
- ☐ Lawncare/Landscaping
- ☐ Trash/Weeds
- ☐ Fencing
- ☐ Signage
- ☐ Clean, painted can/pole and in good repair
- ☐ Visibility

Regional Manager Training with Training RM

[Training Region]

Academy

DAY 2:

WEEK

2

Office

- ☐ Cleanliness of windows and entry ways
- ☐ General office cleanliness and organization
- ☐ Product Displays and Interior Marketing
- ☐ Cleanliness of bathrooms
- ☐ Verify all cameras are working
- ☐ Verify all computers, gates, carts, and equipment are working
- ☐ Organization of Daily Paperwork and Lease Filing
- ☐ Review 10 Customer Leases
[Review older paper lease accounts (30%) and eLease accounts (70%)]

Store Walk Through

- ☐ Full Unit Listing Lock Check (Listing Should Be 100% Compliant)
- ☐ Open all Company/Maintenance Units and 10 Units on the Sales Plan and 5 Random Vacant Units
- ☐ Interior Lot Cleanliness, Free of Weeds and Trash
- ☐ Fence lines in Good Repair and free of weeds and trash
- ☐ Loading Bays clean, entry doors in good repair and access control working correctly
- ☐ Interior halls swept/vacuumed, free of trash/abandoned property
- ☐ Confirm all thermostats are set correctly (80 degrees/Cooling, 50 Degrees/Heat)
- ☐ All interior lights work
- ☐ Exterior lights work (Complete evening drive through if necessary)
- ☐ Identify items in need of maintenance/Capital Expenditure (Capex)

Regional Manager Training with Training RM

[Training Region]

Academy

DAY 2:

ASSET INTEGRITY VISIT

RECAP (1 H)

Include Store Manager (MOD)

Review Asset Integrity Visit with Training RM

Discuss Opportunities and Successes

Discuss Plan of Action (If needed)

Notate Visit in Employee HR Notes

Competition / Revenue Management pricing (1 hour)

☐ What makes a competitor: Like Product, Distance, Trade Area Analysis

☐ RM Review twice monthly

☐ Explain difference between 365/Manual

☐ Discuss Manager Manual Obligations

☐ Parking / Mega

☐ Discuss making competitor and pricing recommendations to Revenue Management

☐ Show how to use the Daily Sales Plan to find anomalies

DAY 2 RECAP (1 H)

Reinforce core principles of Branding, Brand Promise (Easy, Clean, Service) and physical store management

Allow RM in Training to revisit areas of priority/opportunity for them from the days training

REGIONAL MANAGER

WEEK

2

Regional Manager Training with Training RM

[Training Region]



Location:

Should be conducted at a 2nd store location in the training region.

Daily Objectives:

- | | | |
|--|--|--|
| <input type="checkbox"/> Delinquency Management | <input type="checkbox"/> Automated Collection Contacts | <input type="checkbox"/> Auctions |
| <input type="checkbox"/> Review State Guidelines | <input type="checkbox"/> Lock Cut Approval | <input type="checkbox"/> Incidents |
| | <input type="checkbox"/> Lock Cuts | <input type="checkbox"/> Value Coverage Claims |

☐ **Day 3
RECAP**

DAY 3:

WEEK

2

Delinquency Management

- ☐ Goal: Less than 2% of accounts greater than 30 days delinquent

- ☐ **Review State Guidelines 15 minutes**

Collection Contacts (30 min)

- ☐ Discuss Robo Calls/Text and Delinquency Automation
- ☐ Discuss what collection attempts manager should make: Calls/Emails/Letters
- ☐ Discuss Lien Notices → Show example Document in **Report's Center**

Lock Cut Approvals (1 hour)

- | | |
|---|---|
| <input type="checkbox"/> Discuss Deadlines within state guidelines | <input type="checkbox"/> Discuss what to look for in order to approve |
| <input type="checkbox"/> Review Auction Approval and Lock Cut Process Documents | <input type="checkbox"/> Show proper account notes for denial/approval |
| | <input type="checkbox"/> Show examples of completed Auction Approval and Lock cut Process |

Regional Manager Training with Training RM [Training Region]



Lock Cuts (1 hour)

→ Process actual lock cuts if applicable

- ☐ Who performs lock cuts
- ☐ Equipment Used (Discuss OSHA compliance)
- ☐ Photos (5-10 Per Unit for online auction)
- ☐ Account documentation
- ☐ Letter Process (State/ Province Applicable)

Auctions (1.5 hour)

- ☐ Show example of completed legal ad and where to find template
- ☐ Review Online Auctions
- ☐ Pre-Auction Check List: Preventing Unlawful Sale and Disposal
 - ☐ Disposal of Trash Units, Bankruptcy Units, Military Units, Customers with no lease
 - ☐ Approval: Approval and communication must be had with RDO and/or legal counsel
- ☐ Settlement Vacate (Preferred to Auction)
 - Show/Email Copy of Settlement Document
- ☐ Account documentation: Show "real time" example account
- ☐ Reconciliation of customer file and paperwork using the Post Auction Check List
- ☐ Discuss Excess Proceeds
- ☐ Review most recent auction files at the store

DAY 3:

WEEK

2

Regional Manager Training with Training RM [Training Region]

Academy

DAY 3:

WEEK

2

Incidents (1 Hour)

Incident Reports should be Submitted within 24 hours to Claims and RDO

- ☐ Customer vs. Staff Injury Incident Form
- ☐ Discuss Common Incidents
 - ☐ Building/Gate Damage
 - ☐ Break In, Water/moisture issues, Pests
- ☐ Discuss reviewing gate access, cameras, roofs, gutters
- ☐ Review Termination of Possession and Eviction
- ☐ Full Instructions provided on StorageBook

Value Coverage Claims (1 Hour)

- ☐ Claims App
- ☐ Discuss the importance of good customer communication regarding claims process
- ☐ Discuss Importance of Photos and Documentation
- ☐ Discuss the importance of having a complete claim before submitting in app
- ☐ Discuss the Claim process and resolution timeline

DAY 3 RECAP (1 Hr)

Reinforce core principles of delinquency, incident and claim management with focus on documentation

Allow Trainee RM to revisit areas of priority/ opportunity for them

Regional Manager Training with Training RM [Training Region]

Location:

Should be conducted at 3rd store location in the training region

DAY 4

Daily Objectives:

- | | | |
|---|--|--|
| <input type="checkbox"/> Asset Management Store Reviews | <input type="checkbox"/> Invoicing | <input type="checkbox"/> Microsoft Teams |
| <input type="checkbox"/> Invoices/Approvals | <input type="checkbox"/> Vendor Management | <input type="checkbox"/> OneDrive |
| <input type="checkbox"/> Capex: "Fresh Service" | <input type="checkbox"/> Rent Increases | <input type="checkbox"/> Day 4 Recap |

Asset Management Store Reviews (1 Hour)

- ☐ Discuss difference between Business Health and Direct Impact (Acquisitions watch list if applicable)
- ☐ Review Entire Report with Focus on Direct Impact graphs, data, and comments

Invoices/Approvals (2 Hours)

- | | | |
|--|---|---------------------------------------|
| <input type="checkbox"/> Medius (Show how to approve a current pending invoice) | → | RM should review and approve daily |
| <input type="checkbox"/> Petty Cash (Show where to find form and how to complete) | → | Due 3rd of the following month |
| <input type="checkbox"/> Mileage (Show where to find form and how to complete in Concur) | → | Due 3rd of the following month |
| <input type="checkbox"/> Amazon approvals (Have Store Place Order to complete an approval) | → | RM should review and approve daily |
| <input type="checkbox"/> Purchase Orders (Have store place PO to complete an approval) | → | RM should review and approve same day |
| <input type="checkbox"/> Inventory (Have Store Submit Inventory and complete RM adjustments) | → | Due 15th of each month |
| <input type="checkbox"/> Check requests (Show where to approve check requests) | → | RM Should review and approve same day |

Regional Manager Training with Training RM

[Training Region]

Academy

DAY 4:

Capex (1.5 Hours)

[Use a recent Capex Project as an example] "Fresh Service"

- ☐ Discuss Determining Scope of Work
- ☐ Show how to present suggestions to RDO/Construction
- ☐ Discuss why we Prioritize Revenue Enhancement, Urgent/ Preventative, Branding, Aesthetic
- ☐ Discuss Importance of "like" Comparative Estimates

Invoicing

- ☐ W9 (U.S. Only) and Insurance
- ☐ Down Payment Invoices
- ☐ Final invoicing should include photos and proof of completion with your approval

Vendor Management (1 Hour)

- ☐ Vendor List (Teams)
- ☐ Explain Seasonal vendors (Lawn/Snow Care) vs. Consistent Vendors (HVAC, Electric, Etc.)

Rent Increases (30 min)

- ☐ How to Make them Stick/When to reduce
- ☐ What you should consider for an increase waive/reduction:
 - ☐ Unit Type Occupancy
 - ☐ Customer History
 - ☐ Customer rent w/ Increase compared to current deluxe market rate
 - ☐ Possible Customer complaint/ Review/BBB

Regional Manager Training with Training RM [Training Region]

Academy

DAY 4:

Microsoft Teams (1 hour)

- ☐ Set up Team
 - ☐ Add/Edit Channels
 - ☐ Remove temporary team members
 - ☐ Use of Files and File Sharing
- ☐ Holding and Recording a Meeting
 - ☐ Team communication
 - ☐ Daily, weekly, monthly store reports
 - ☐ Use of Planner and Tasks

OneDrive (30 Min)

- ☐ Access and file management

DAY 4

RECAP (1 Hr.)

Reinforce core principles of store maintenance, vendor management and invoice reconciliation

Allow Trainee RM to revisit areas of priority/opportunity for them

Regional Manager Training with Training RM

[Training Region]



DAY 5

Breakfast Meeting - Full Training Recap

Review Week 2 Training using the Week 2 training check list to confirm there is an understanding of why we prioritize in this order and how we deliver the brand promise of Easy, Clean, Service.

<input type="checkbox"/>	Sales/ KPI's/ Customer satisfaction
<input type="checkbox"/>	Facilities Curb Appeal Inside and Out
<input type="checkbox"/>	Staff Ability & Development / Scheduling
<input type="checkbox"/>	Inventory IQ
<input type="checkbox"/>	Value Pricing



RM Trainee should use Week 2 training Check List to determine training topics they would like to focus on in Week 4.

REGIONAL MANAGER
WEEK
2

Notepad



This is a good place to write down your logins, questions etc.



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Week 3

Department asks relevant to the RM's responsibilities

Department Intros and training.

Departments

Human Resources

- ☐ Field and answer any questions
- ☐ Fill Out New Hire Paperwork
- ☐ Who do I contact for what?
- ☐ Confirm logins and demonstrate if necessary:
 - ☐ Total Recall login
 - ☐ StorageBook login

- ☐ HR Module
 - ☐ Employee lookup
 - ☐ Adding notes
 - ☐ Document/Uploads Review

Ceridian/ADP Login

- ☐ Schedules
- ☐ Approving TimeCards/
Fixing Punches
- ☐ Clocking In/Out- Department
- ☐ Payroll Information
- ☐ PTO: Balances & Requests
- ☐ Forms Library

Supervisor/Hiring

- ☐ Ceridian
- ☐ Hiring Practices and Procedures
- ☐ Employee Benefits
- ☐ Employee Discipline/ PIPS
- ☐ How to Handle Common Issues

Marketing**Introduction to Marketing****Driving Visitors to Our Website and Stores**

- ☐ Paid Advertising
- ☐ Managing Rank in Google
- ☐ Organic Web Results
- ☐ Storage Industry Aggregators

Advertising and SEO Strategy, How Regional Can Assist

Targeting Ads to Local Areas - Geography

Measures Key Metrics

- ☐ Days to 50 bookings
- ☐ Overall Bookings
- ☐ Occupancy
- ☐ Closing Rates

What are the Marketing Training Points**Optimization of Company Website and Social Media**

- ☐ Email Marketing Funnels
- ☐ Understanding Target Audiences
- ☐ Store It Forward
- ☐ Charity Donations
- ☐ Reviews
- ☐ Signage

Reputation Management

- ☐ All Web/Online Reviews
- ☐ BBB Complaints and/or any escalation

Revenue Management**Review of Value Pricing**

- ☐ Ranking Units
- ☐ Algorithms
- ☐ Rules sheet
- ☐ APW
- ☐ Discounts/Promotions

- ☐ Pricing Data Screens
- ☐ Starting Rates/ Increases
- ☐ Demographic Mapping
- ☐ Scorecards
- ☐ Competition Report
- ☐ Tableau Reports
- ☐ Rent Increase-Existing Customers

Asset Management

Review Operations - All Stores and Regions

- ☐ Goals
- ☐ Audits
- ☐ Challenges
- ☐ Merchandise Pricing
- ☐ RM Communications

Reporting

- ☐ Monthly Watch List
- ☐ Region Report Card
- ☐ Tracking
- ☐ Tableau

Metrics

New Acquisitions

Business Intelligence

- ☐ Creates and Maintains All Reports
- ☐ Data Query Requests
- ☐ Maintain Marketing Database/
Ops Dashboard



Department Training

Construction

Review CapEx vs FFE

- ☐ Requirements for each
- ☐ Tips and Phone Numbers Exchanged

Learn and/or Answer Questions About:

- ☐ Survey
- ☐ Building Details
- ☐ Unit Layout
- ☐ Store Information
- ☐ Acquisition Development
- ☐ Provides Support and Contract Approval for Large Capital Improvement Projects
- ☐ Designs, Budgets, Completes, or Assists all Revenue Enhancing Projects
- ☐ Ensures Proper Long-Term Maintenance Standards are Implemented by Operations

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Department Training

REGIONAL MANAGER

self storage
Boxes
Moving Supplies
1-877-STORAGE

Acquisitions

Bid Process/ Letter of Intent (LOI)

- ☐ LOI/PSA (Purchase & Sale Agreement) Discussion

Modeling

Research- Internal/External

- ☐ Projection of Cash Flow
- ☐ Revenue Increasing Policies- How This Affects Acqs.
- ☐ Market Research- Performance
- ☐ Current Portfolio
- ☐ Macro Economics

Competition Analysis

- ☐ Analyzing Markets
- ☐ Industry Investigation
- ☐ 5-10 Year Returns

Contract Negotiation

- ☐ Underwriting
- ☐ Deliverables- Internal/External

Due Diligence

- ☐ Delegation for preparation of Closing- Home Office Departments
- ☐ 3rd Party Consultants

Beginning to Close

- ☐ Business Plan

Closing

- ☐ Closing Details
- ☐ Post-Closing
 - ☐ Quarterly Debt Compliance

Department Training

Accounting

Company Structure

☐ Financial

☐ Reports

Business Environment

Company Size/Competitors

Financial Statements

Year End
(9/30 for U.K. & 12/31
for U.S. & CAN)

Monthly Close Schedule

☐ Duties Assigned

Annual Audits

Concur/Medius

☐ Paperless Invoice - Medius

☐ Log Into Concur

☐ Show how to email invoices to concur, complete coding, creating an expense report and submitting an expense report

☐ Via the phone app, show how to email invoices to concur, complete coding, creating an expense report and submitting an expense report

SRC

SRC Mission

Introduction to SRC Support Team Staff

☐ New Store Set Up

☐ Telco

Call Routing/Call Volume/Answer Rate

Bookings

☐ Lead

☐ RIN/O

Call Center App

☐ Types of Bookings

☐ Features

☐ Store Features

☐ Customer Service Calls

☐ Customer Issues, Complaints, and Resolution

Measuring Representative's Performance

☐ Monitoring Calls

☐ Compliments & Complaints

Continuing Education Measures

IT

Meet the Staff

IT Employee Overview

- ☐ Duties Assigned
- ☐ Discussion of Roles
- ☐ Who to Contact
 - ☐ Password Related Issues
 - ☐ IT Support Issues

☐ Employee Systems Set Up

- ☐ Phone/Voicemail
- ☐ Email
 - ☐ Archived for a Lifetime
 - ☐ Identifying Spam

☐ Computer/Laptop

- ☐ GP Access on Laptop

☐ Teams Interactions

- ☐ If Email, Always Email _IT

☐ Technical Support

- ☐ Help Desk
- ☐ Detailed Requests
- ☐ Time Management: Steve, Michael

Meet the Staff

- ☐ Hardware/Software/Developer Request
- ☐ Operational Suggestions
- ☐ StorageMart Systems Security

Tableau

- ☐ Meet with Alan on all regional Manager Reports

Department Training

Regional Manager Training

StorageMart

Academy

Day 4

LMS (1 Hour) - To be completed after HR Meeting

☐ UKG Basics and Tutorials

☐ Interviewing and Hiring

☐ Managing Performance

Operations LMS (1 Hour) – Discuss with Training RM Week 4

☐ How to delegate

☐ Office Hours

☐ Email Ethics

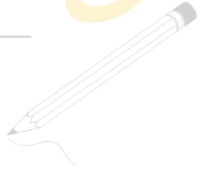
Day 4

REGIONAL MANAGER WEEK 3

Notepad

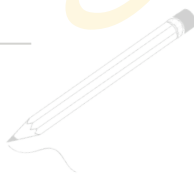


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Academy



Location: Home office

Objectives for week four include:

- ☐ Bring together learning from weeks one through three
- ☐ Learning in Regional Manager home region with outside Regional Manager
- ☐ How to Audit and dig into challenges to find solutions
- ☐ Systems – make sure RM has all access and region notifications are coming to new RM

Goals for week

- ☐ **Day 1** | Learn KPI Goals, Store Tiers, and major Property SOP's
- ☐ **Day 1** | Hands on use of Ultipro
- ☐ **Days 2-4** | Property Abbreviated Asset Integrity Reviews for Operations and Property
- ☐ **Days 1-5** | Tend to all questions by Staff, Regional Tasks and Approvals
- ☐ **Days 1-5** | Touch all systems to make sure RM is aware of and has access to each
- ☐ **Days 1-5** | Training RM to provide Guidance in Managing Time and Priorities/balancing office vs. field tasks

Regional Manager Training

Academy

Day 1 / **8.5 hours**

Day Objectives and Goals

..... 15 minutes

- ☐ Take care of day to day issues
- ☐ Personnel, Staffing, Scheduling and Ultipro Use
- ☐ NOI and KPI Overview
- ☐ Store Analysis – Store Tiers, Best, Worst, Largest, Smallest
- ☐ Visit to Best Store: Partial Asset Integrity Review

Today's Challenges

(Including but not limited to)

..... 45 minutes

- ☐ Email
- ☐ Approvals
- ☐ Schedule
- ☐ Hiring
- ☐ Deadlines
- ☐ Company Initiatives

Personnel Review & Ultipro/UKG:

..... 45 minutes

- | | | |
|---|--|--|
| <input type="checkbox"/> Staffing review | <input type="checkbox"/> Time cards | <input type="checkbox"/> Reviewing and Dispositioning Applicants |
| <input type="checkbox"/> Load all staff into phone along with Store information | <input type="checkbox"/> Time Off Requests | <input type="checkbox"/> Interviewing process, HR screening, RM screening, Store Manager screening |
| <input type="checkbox"/> Employee Notes - review Staff you will visit today | <input type="checkbox"/> Review Open Requisitions | <input type="checkbox"/> Interview questions |
| <input type="checkbox"/> Review Staff Schedule (Change/Publish) | <input type="checkbox"/> Posting and Closing Job Ads | <input type="checkbox"/> Hiring process |

DAY 1

WEEK 4

REGIONAL MANAGER

Regional Manager Training



Day 1 / 8.5 hours (continued)

NOI – Overview 30 minutes

- ☐ Tableau
- ☐ View by region and store
- ☐ Drill down by Revenue and Expenses

- ☐ Why each is important, show in Tableau & SB Ops Dashboard

KPI Goals 30 minutes

KPI	Goals
RIN Closing	95%
RINO Closing	70%
Leads (Sparefoot)*	35%
VP Upgrade	Walk In 60%, SRC 60%, Web 35%
VCP Sales (Check-In)	90%
VCP Tier Sold	Lowest Plan: Less Than 50% Solid
1 st Call	Zero missed
Google Reviews	25% of rentals*
Credit Per Occ. Unit	\$0.40*
KPI Goal Measurement Range	Trailing 4 Weeks

Property Management SOP's - Basic

- ☐ Property and Drive Lanes are free of weeds
- ☐ Landscaping well groomed and trimmed
- ☐ Signs bright and working
- ☐ Interior/Exterior lighting on and none out
- ☐ Hall Floor Swept and Mopped
 - ☐ Hall Floors: 2x per week
 - ☐ Bay Entries: Daily
 - ☐ Hall Entries: Daily
- ☐ Interior Doors dusted
 - ☐ Review Door Dusting Schedule
- ☐ No trash on property
- ☐ Building damage fixed
- ☐ All doors operational, customer and entrance

During Property Management SOP, Review the Following:

- ☐ Open all Mechanical Rooms/Misc
- ☐ Doors: Sprinkler, HVAC, Elevator, Boiler, Janitorial, etc)
- ☐ Discuss Sprinkler System (If Applicable):
- ☐ Wet/Dry System and Maintenance Expectations
- ☐ Discuss Roofs: Access Points, Type of Roof and Maintenance Expectations
- ☐ Vendors: Confirm Vendors or Included in each store/region vendor list

Regional Manager Training



Day 1 / **8.5 hours (continued)**

☐ Store Analysis 1 hour & 30 minutes

- ☐ Determine Best and Worst Performing stores [based on NOI performance, then KPI]
 - ☐ What do their NOI, KPI's, Occupancy/Vacancy, Demand, Pricing and Competition indicate?

- ☐ Tableau
 - ☐ My Storage
 - ☐ Scorecard
 - ☐ Other tabs to drill down
 - ☐ Operations Dashboard
- ☐ Identify Areas of Success
- ☐ Identify Areas of Opportunity
- ☐ Identify Opportunity Resolutions

☐ Determine Largest and Smallest Store [by Square Feet] 1 hour & 30 minutes

- ☐ What do their NOI, KPI's, Occupancy/Vacancy, Demand, Pricing and Competition indicate?

- ☐ Tableau
 - ☐ My Storage
 - ☐ Scorecard
 - ☐ Other tabs to drill down
 - ☐ Operations Dashboard
- ☐ Identify Areas of Success
- ☐ Identify Areas of Opportunity
- ☐ Identify Opportunity Resolutions

DAY 1 WEEK 4

Regional Manager Training

Academy

Day 1 / 8.5 hours (continued)

Asset Integrity Visit – [Best Performing Store – Combined KPI's and NOI] 1 hour & 30 minutes

☐ Store Staff Discussion

☐ Store Goals and KPI's

- ☐ Can they articulate their KPI's and compare to Region?
- ☐ Do they know where to look them up in Operations Dashboard
- ☐ KPI's - show manager in [MyStorage Scorecard](#) and StorageBook Ops Dashboard

Property Management SOP's - Basic

☐ Property and Drive Lanes are free of weeds

☐ Landscaping well groomed and trimmed

☐ Signs bright and working

☐ Interior/Exterior lighting on and none out

☐ Hall Floor Swept and Mopped

- ☐ Hall Floors: 2x per week
- ☐ Bay Entries: Daily
- ☐ Hall Entries: Daily

☐ Interior Doors dusted

- ☐ Review Door Dusting Schedule

☐ No trash on property

☐ Building damage fixed

☐ All doors operational, customer and entrance

During Property Management SOP, Review the Following:

- ☐ Open all Mechanical Rooms/Misc
- ☐ Doors: Sprinkler, HVAC, Elevator, Boiler, Janitorial, etc)
- ☐ Discuss Sprinkler System (If Applicable):
- ☐ Wet/Dry System and Maintenance Expectations
- ☐ Discuss Roofs: Access Points, Type of Roof and Maintenance Expectations
- ☐ Vendors: Confirm Vendors or Included in each store/region vendor list

☐ Rental Process Audit:

☐ Rental Manager - open and review

☐ 1st calls made on time: 15 minutes

☐ Follow up Call: made within compliance

☐ Excellent notes regarding customer follow up

☐ Customer Notes Review: prior 10 rentals

☐ Listen to 5-7 customer follow up calls

☐ Ensure old leads are being purged

☐ Ensure vacate queue is being used appropriately. Discuss the importance of the vacate queue.

Regional Manager Training

Academy

Day 1 / 8.5 hours (continued)

Property Tour

- ☐ Partial - lock check 25%
- ☐ Review Last 10 Rentals
- ☐ Fully executed and signed eLease/lease
- ☐ VC Upgrade
- ☐ VP Upgrade
- ☐ Lock sold
- ☐ Customer Notes:
- ☐ Gate Hours given
- ☐ If Value Coverage was declined, personal Insurance Declaration Page is in file

Wrap up Store Visit with Store Manager:

- ☐ Acknowledge and discuss successes.
- ☐ Acknowledge and discuss opportunities
- ☐ Determine if additional assistance is needed.

Regional – EOD Store Visit Review 1 Hour

- ☐ Create priorities and action items from asset review
- ☐ Add HR note for staff
- ☐ Create Follow up note in email/MS Teams store channel
- ☐ Open and Review - MyStorage Scorecard again
 - ☐ KPI's
 - ☐ What areas are performing well?
 - ☐ Is it sustainable? Why?
 - ☐ Where are opportunities?
 - ☐ Where do you dig in to fix?
 - ☐ Property Tour - spot lock check
 - ☐ What was excellent?
 - ☐ What needs to be addressed immediately?
 - ☐ What needs to be addressed in 90 Days?
 - ☐ What should be on CAPEX next year?

Day 2 / **8.5 hours**

Day Objectives and Goals 15 minutes

- ☐ Take care of day to day issues
- ☐ Communication Systems: Ring Central and MicroSoft Teams - Increase use and knowledge
- ☐ Store Asset Review - Dive deeper
- ☐ Tasks and Planner

Today's Challenges 30 minutes
(Including but not limited to)

- ☐ Email
- ☐ Deadlines
- ☐ Approvals
- ☐ Company Initiatives
- ☐ Schedule
- ☐ Hiring

Personnel Review & Ultipro/UKG: - quick review and touch software daily 30 minutes

- ☐ Employee Notes - read notes on Staff you will visit today
- ☐ Review Staff Schedule (Change/Publish)
- ☐ Timecards
- ☐ Time Off Requests
- ☐ Posting Job ads
- ☐ Reviewing applicants
- ☐ Interviewing process, HR screening, RM screening, Store Manager screening
- ☐ Interview questions
- ☐ Hiring process

MS Teams - quick review and touch software daily 30 minutes

- ☐ Tasks and Planner
- ☐ Use Region Team and Create store channels
- ☐ Create Video Meetings and Screen Sharing
- ☐ How to add files
- ☐ Chat vs MST Group communication
- ☐ Email and embed into MS Teams channel or chat

Regional Manager Training

Academy

DAY 2:

Day 2 / **8.5 hours (continued)**

Ring Central 30 minutes

- ☐ Download app to phone, how to call SM team HO personnel
- ☐ Download RC computer software
- ☐ How to view and join RC video meetings

Pre-visit Review: Worst Performing Store 1 Hour 30 minutes

- ☐ Review Prior information from Day 1
- ☐ KPI's
 - ☐ Identify areas that need focus.
 - ☐ Identify areas where there are roadblocks to performance.
 - ☐ Use Tableau tabs to look at each KPI separately
- ☐ Occupancy Review: Tableau drill down
 - ☐ Unit Groups
 - ☐ Vacant % and # by unit group
 - ☐ Pricing competitive
 - ☐ View Competition module
- ☐ **Credits** from Asset Management Store Review
 - print and review prior 30 days
- ☐ **Discounts** from Asset Management Store Review
 - print and review prior 30 days

Regional Manager Training

Day 2 / **8.5 hours (continued)**



Asset Integrity Visit – [Worst Performing Store] – Combined KPI's and NOI

..... 3 hours

- ☐ Store Staff Discussion
 - ☐ Store Goals and KPI's
 - ☐ Can they articulate their KPI's and compare to region?
 - ☐ Do they know where to look them up in Operations Dashboard?
 - ☐ KPI's - show manager in MyStorage Scorecard

Property Management SOP's – Basic

- ☐ Property and Drive Lanes are free of weeds
- ☐ Landscaping well-groomed and trimmed
- ☐ Signs bright and working
- ☐ Interior/Exterior lighting on and none out
- ☐ Hall Floor Swept and Mopped
 - ☐ Hall Floors - 2x per week
 - ☐ Bay Entries – Daily
- ☐ Interior Doors dusted
 - ☐ Review Door Dusting Schedule
- ☐ No trash on property
- ☐ Building damage fixed
- ☐ All doors operational, customer and entrance
- ☐ Hall Entries – Daily

During Property Management SOP, Review the Following:

- ☐ Open all Mechanical Rooms/Misc Doors: Sprinkler, HVAC, Elevator, Boiler, Janitorial, etc)
- ☐ Discuss Sprinkler System (If Applicable): Wet/Dry System and Maintenance Expectations
- ☐ Discuss Roofs: Access Points, Type of Roof and Maintenance Expectations
- ☐ Vendors: Confirm Vendors or Included in each store/region vendor list

Rental Process Audit:

- ☐ Rental Manager - open and review
 - ☐ 1st calls made quickly 1-15 minutes.
 - ☐ 2nd+ Calls – are we calling at appropriate times?
 - ☐ Early, noon, end of day? (10-11:30 and 1:30-4 are not good times to call)
 - ☐ Are we clearing out all old/dead leads?
 - ☐ Is vacate que being used appropriately?
 - ☐ Vacate Que
 - ☐ Customer Notes Review: prior 10 rentals
 - ☐ Listen to 5-7 customer follow up calls

Regional Manager Training



Day 2 / **8.5 hours (continued)**

Property Tour: With Audit Form

☐ Complete - lock check 100% 15 minutes

Open all

☐ vacant units

☐ company units

☐ maintenance units / wet units (Leaking Unit Tracking)

☐ Economy/ Irregular units

Review Last 10 Rentals

- ☐ Fully executed and signed eLease/lease

☐ VC Upgrade

☐ VP Upgrade

☐ Product sold/Lock?
- ☐ Customer Notes:

☐ Gate Hours given

☐ No VC is there an Insurance Declaration Page in file

Wrap up Asset Integrity Visit - Manager answer questions:

- ☐ What are you doing well?

☐ What do you need to improve?

☐ What do you need from me?

Gate Systems: WinSen or Open Tech45 minutes

WinSen

- ☐ Keypad operation: demonstrate how to reset

☐ WinSen at Gate computer

☐ View Tenant Window

☐ Activity Window

☐ Open gates/doors remotely

☐ Troubleshooting

☐ DHS/TR not syncing gate information: Manually add customer and gate code

☐ Reboot of gate computer/WinSen Sim Card

☐ Log Me In: WinSen Remote Gate Management

DAY 2

WEEK 4

Regional Manager Training

Academy

Day 2 / **8.5 hours (continued)**

Gate Systems: WinSen or Open Tech (continued) 45 minutes

Opentech

- | | |
|--|---|
| <ul style="list-style-type: none"><input type="checkbox"/> Keypad operation – Code Difference (#123456*)<input type="checkbox"/> Unlocked App installation<ul style="list-style-type: none"><input type="checkbox"/> IT to load data for new RM<input type="checkbox"/> How to use app at door or gate | <ul style="list-style-type: none"><input type="checkbox"/> Opening OpenTech computer app<ul style="list-style-type: none"><input type="checkbox"/> Link or App on desktop<input type="checkbox"/> Access Keypads<input type="checkbox"/> Open/Close doors and gates<input type="checkbox"/> View and print Gate log for access |
|--|---|

- ☐ Troubleshooting
 - ☐ App not letting customers access: Get Admin Access to log in to system to change sensitivity Keypad
 - ☐ Open Tech Customer Support

Regional – EOD Asset Integrity Review 1 Hour

- ☐ Create priorities and action items from asset review
 - ☐ Email or MS Teams note for staff follow up
 - ☐ Add HR note for staff

- | | |
|---|---|
| <ul style="list-style-type: none"><input type="checkbox"/> Open and Review - MyStorage Scorecard again<ul style="list-style-type: none"><input type="checkbox"/> KPI's<ul style="list-style-type: none"><input type="checkbox"/> What areas are performing well?<input type="checkbox"/> Is it sustainable? Why?<input type="checkbox"/> Where are weaknesses?<input type="checkbox"/> Where do you dig in to fix? | <ul style="list-style-type: none"><input type="checkbox"/> Property Tour - spot lock check<ul style="list-style-type: none"><input type="checkbox"/> What was excellent?<input type="checkbox"/> What needs to be fixed quickly?<input type="checkbox"/> What needs to be addressed in 90 Days?<input type="checkbox"/> What should be on CAPEX next year? |
|---|---|

Day 3 / 7.75 hours

Day Objectives and Goals 15 minutes

- ☐ Take care of day to day issues
- ☐ Competition and Occupancy
- ☐ MicroSoft Teams - Increase use and knowledge
- ☐ Detailed review of Store Asset Review

Today's Challenges 1 Hour
(Including but not limited to)

- ☐ Email
- ☐ Company Initiatives
- ☐ Approvals
- ☐ Schedule
- ☐ Hiring
- ☐ Deadlines

MS Teams..... 30 minutes

- ☐ Create conference call meeting for Friday morning
- ☐ Create conference call meeting for Friday morning
- ☐ Create shared documents
- ☐ How to add files
- ☐ Chat vs Group communication
- ☐ Email

Competition 45 minutes

- ☐ Review Comps on Google Maps
- ☐ Compare to Trade area analysis
- ☐ View pricing in Competition Module
- ☐ Manual input vs 365 Scrape
- ☐ View pricing in Tableau My Storage Tab
- ☐ Do a competitive shop of #1 comp for this store

Occupancy Review 1 Hour

- ☐ Open Tableau Occupancy Tab
- ☐ View by Region 1st
 - ☐ by Unit Group
 - ☐ Lowest % group
 - ☐ Unavailable
- ☐ Store(s) with lowest occupancy groups
 - ☐ Check pricing
 - ☐ Check competition
 - ☐ Determine Ranking issues
 - ☐ Discuss with Revenue Management
 - ☐ What is the next step?

Regional Manager Training

Day 3 / 7.75 hours (continued)



Asset Integrity Visit – [1 Store – Largest SF Store]2 Hours 30 minutes

☐ Store Staff Discussion

☐ Store Goals and KPI's

☐ Can they articulate their KPI's and compare to region?

☐ Do they know where to look them up in Operations Dashboard?

☐ KPI's - show manager in MyStorage Scorecard

Property Management SOP's – Basic

- ☐ Property and Drive Lanes are free of weeds
- ☐ Landscaping well-groomed and trimmed
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 - ☐ Hall Floors - 2x per week
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- ☐ Interior Doors dusted
 - ☐ Review Door Dusting Schedule
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- ☐ Discuss Roofs: Access Points, Type of Roof and Maintenance Expectations
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Rental Process Audit:

- ☐ Rental Manager - open and review
- ☐ 1st calls made quickly 1-15 minutes.
- ☐ Follow-Up Calls: made within compliance
- ☐ Excellent notes regarding customer follow up
- ☐ Are we clearing out all old/dead leads?
- ☐ Is vacate que being used appropriately?

Regional Manager Training

Academy

Day 3 / 7.75 hours (continued)

Review Last 10 Rentals

- | | | |
|---|---|---|
| <input type="checkbox"/> Fully executed and signed eLease/lease | <input type="checkbox"/> VP Upgrade | <input type="checkbox"/> Customer Notes: |
| <input type="checkbox"/> VC Upgrade | <input type="checkbox"/> Product sold/Lock? | <input type="checkbox"/> Gate Hours given |
| | | <input type="checkbox"/> No VC is there an Insurance Declaration Page in file |

Property Tour – [Build out levels of audit 30% 60% & 100%]

DAY 3:

Inventory IQ Check

- | | |
|--|---|
| <input type="checkbox"/> Open 30% vacant units | <input type="checkbox"/> Open all company units |
| <input type="checkbox"/> Open all Maintenance units | <input type="checkbox"/> Open all wet units |
| <input type="checkbox"/> Note deficiencies | |
| <input type="checkbox"/> Door operation/Damage | <input type="checkbox"/> Cleanliness |
| <input type="checkbox"/> Walls and ceilings (insulation) | <input type="checkbox"/> Update Leaking Unit Tracking sheet |

Wrap up Store Visit with Store Manager

- | | |
|---|--|
| <input type="checkbox"/> Acknowledge and discuss successes. | <input type="checkbox"/> Determine if additional assistance is needed. |
| <input type="checkbox"/> Acknowledge and discuss opportunities. | |

Regional Manager Training

Academy

Day 3 / 7.75 hours (continued)

Regional – EOD Asset Integrity Visit Review 1 Hour

- ☐ Create priorities and action items from asset review
 - ☐ Email or MS Teams note for staff follow up
 - ☐ Add HR note for staff

☐ Open and Review - MyStorage Scorecard again

☐ KPI's

- ☐ What areas are performing well?
- ☐ Is it sustainable? Why?
- ☐ Where are weaknesses?
- ☐ Where do you dig in to fix?

☐ Property Tour - spot lock check

- ☐ What was excellent?
- ☐ What needs to be fixed quickly?
- ☐ What needs to be addressed in 90 Days?
- ☐ What should be on CAPEX next year?

DAY 3:

WEEK

4

DAY
1-3
Review

Review Days 1-3

..... 45 minutes

- ☐ What questions does the RM trainee have?
- ☐ Determine priorities for Day 4 & 5
- ☐ Determine Immediate needs and obstacles
- ☐ Recap with RDO: Teams meeting

Day 4 / **7.75 hours**

Day Objectives and Goals 15 minutes

- ☐ Take care of day to day issues
- ☐ MicroSoft Teams & UKG- Increase use and knowledge
- ☐ NOI's | CAPEX | Competition Reviews
- ☐ Store Audit and Review - Dive deeper
- ☐ Auction Process

Today's Challenges 45 minutes
(Including but not limited to)

- ☐ Email
- ☐ Company Initiatives
- ☐ Approvals
- ☐ Deadlines
- ☐ Schedule
- ☐ Hiring

MS Teams - quick review and touch software daily 20 minutes

- ☐ Demonstrate creating a Meeting Agenda
 - ☐ Follow Up: Employee notes, store visits and KPI Reviews
- ☐ Make Video call
- ☐ Create shared documents
- ☐ How to add files
- ☐ Chat vs Group communication
- ☐ Email
- ☐ Tasks and Planner

Personnel Review & Ultipro/UKG: - quick review and touch software daily 25 minutes

- ☐ Employee Notes - read on Staff you will visit today
- ☐ Review Staff Schedule (Change/Publish)
- ☐ Timecards
- ☐ Time Off Requests
- ☐ Posting Job ads
- ☐ Reviewing applicants
- ☐ Interviewing process, HR screening, RM screening, Store Manager screening
- ☐ Interview questions
- ☐ Hiring process

Regional Manager Training



Day 4 / **7.75 hours (continued)**

P&L Review / NOI's1 Hour

- ☐ Print/View most recent P&L
- ☐ Discuss goals for revenue, expenses, NOI
- ☐ Discuss difference between Year Over Year, Year vs. Budget, Same Store Revenue
- ☐ Review maintenance expense: discuss preventing CAPEX from applying to direct maintenance expense
- ☐ Show Drill Down function
- ☐ Show Correlation to Business Health Asset Integrity Visit
- ☐ Show how to communicate to staff and Expectation of response

CAPEX1 Hour

- ☐ CAPEX budget in Construction SharePoint folder
- ☐ Show CAPEX Fresh Service Module
- ☐ Understand format to deliver to Construction for approval
- ☐ Create a scope of work for a CAPEX project
- ☐ Request RDO assistance on complex projects
- ☐ When is CAPEX an emergency?

Competition & Pricing1 Hour

- ☐ Competition
 - ☐ What makes a competitor: Like Product, Distance, Website, Market Analysis
 - ☐ Explain difference between 365 vs. Manual
 - ☐ Review monthly vs. weekly
- ☐ Manager Obligations
 - ☐ Update Manual pricing
 - ☐ Identify new competitors
- ☐ Parking/Mega
 - ☐ Emphasize Revenue Potential

Regional Manager Training

Day 4 / **7.75 hours (continued)**

Academy

Competition & Pricing (continued)

Pricing

- ☐ Review Store trend
- ☐ Review Current Occupancy vs Pricing on Unit Sizes
- ☐ Look at demand vs pricing trends
- ☐ Are we competitive to our #1 competitor?

Systems

- ☐ Tableau: MyStorage Scorecard, Traffic, Demand, Pricing

StorageBook

- ☐ Operations Dashboard show how RM and Staff can see trends

Asset Integrity Visit - (1 Store – Smallest SF Store) 2 Hours

- ☐ KPI Review
- ☐ Property Review
- ☐ Inventory IQ
 - ☐ Does Store have approved Map?
 - ☐ Review and drill down in MyStorage Occupancy Tab
 - ☐ Map units not rented over 180 days by unit size
 - ☐ Based on inventory opportunities, should you make new unit sizes?
 - ☐ Unit Change Request – use approved format

REGIONAL MANAGER WEEK 4

Asset Integrity Visit - (1 Store – Smallest SF Store) Continued.....2 Hours

- ▣ Leaking Unit tracking sheet (StorageBook)
 - ▣ Verify Store Manager is tracking rains and wet unit information correctly
 - ▣ Map wet units on store map

- ▣ Portfolio Unavailable Units Report
 - ▣ Review all unavailable units with manager
 - ▣ Determine plan to bring unavailable units back into service

- ▣ Economy and Irregular Units
 - ▣ Review Economy and Irregular Units with manager
 - ▣ Open unit and determine accuracy of status

Wrap up Store Visit with Store Manager:

- ☐ Acknowledge and discuss successes.
- ☐ Acknowledge and discuss opportunities.
- ☐ Determine if additional assistance is needed.

Regional – EOD Asset Integrity Review 1 Hour

☐ Open and Review - MyStorage Scorecard again

☐ KPI's

☐ What areas are performing well? —————> Is it sustainable? Why?

☐ Where are opportunities? —————> Where do you dig in to fix?

Regional – EOD Asset Integrity Review

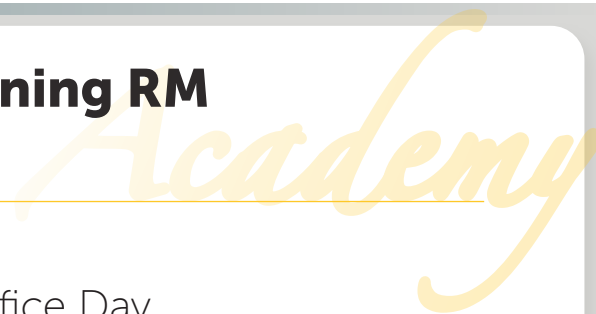
☐ Create priorities and action items from asset review

☐ Add HR note for staff

☐ Create Follow up note in email/MS Teams store channel

DAY 4:

Regional Manager Training with Training RM [Home Region]



Day 5 / **4 hours** | Morning Review | Afternoon Office Day

Today's Challenges (Included but not limited to) 1 hour

- ☐ Email ☐ Schedule ☐ Approvals ☐ Hiring

DAY 4:

Conference Call with Staff 1 hour

- ☐ RM Trainee to co-lead with RM
 - ☐ Share company KPI's vs region KPI's
 - ☐ Discuss region successes
 - ☐ Discuss region opportunities
 - ☐ Identify obstacles
 - ☐ What help does the region need from RM or RDO
 - ☐ Discuss new company initiatives, training, etc.
 - ☐ Provide open forum for staff feedback or concerns

Office Day 2 Hours

- ☐ Weekly Review and Follow up
 - ☐ Recap week, follow up on opportunities and successes
 - ☐ Put notes in HR Ultipro for each staff
 - ☐ Review how to increase Revenue and NOI

- ☐ Training RM: Returns to Home Region

Notepad



This is a good place to write down your logins, questions etc.



A series of horizontal grey lines spanning the width of the page, providing a space for handwritten notes.

Academy



Regional Manager Training with RDO

Academy

DAY 1:

6 hours, 30 minutes

WEEK

5

Objectives and Goals 30 minutes

- ☐ Review today's challenges
- ☐ Time/Priority Management (Daily, Weekly, Monthly)
- ☐ Unique Customer Resolutions
- ☐ Maximizing Revenue Potential
- ☐ Reviewing Monthly/Annual Revenue Results

Today's Challenges (Included but not limited to)1 hour

- | | |
|------------------------------------|--|
| <input type="checkbox"/> Email | <input type="checkbox"/> Hiring |
| <input type="checkbox"/> Approvals | <input type="checkbox"/> Deadlines |
| <input type="checkbox"/> Schedule | <input type="checkbox"/> Company Initiatives |

Time and Priority Management 2 hours, 30 minutes

- ☐ Office/Field Work (Balance)1 hour, 30 minutes
 - ☐ RM Duties Calendar
 - ☐ RM Deadlines
 - ☐ P&L Reviews (Monthly)
 - ☐ KPI Reviews (Weekly)
 - ☐ Store Visit/Audits (Weekly/Quarterly)
- ☐ Capex Assessments (Annually)
 - ☐ Bidding and Project Management
- ☐ Watch List (Monthly).....1 hour
- ☐ Action Plans (Immediate)
- ☐ Store Audit (Immediate)

Regional Manager Training with RDO

Academy

Day 2 / **7 hours**

Maximizing Revenue 3 hours

☐ P&L Reviews 2 hours

- ☐ Print/View most recent P&L
- ☐ Review Controllable Revenue Opportunities
- ☐ Discuss goals for revenue, expenses, NOI
- ☐ Discuss difference between Year Over Year, Year vs. Budget, Same Store Revenue
- ☐ Show Drill down function
- ☐ Show Correlation to Business Health Asset Integrity Visit
- ☐ Show communication to staff, Expectation of response

KPI Reviews 1 hour

- ☐ Review KPI that result in Positive Revenue
- ☐ PMS KPI Reporting
- ☐ Tableau Reports
- ☐ Operations Dashboard

WEEK

5



Regional Manager Training with RDO

Academy

Day 2 / **7 hours**

Today's Challenges (included but not limited to) **1 Hour**

- | | | |
|--|---|--|
| <input type="checkbox"/> Email | <input type="checkbox"/> Maximizing Revenue (Continued) 4 hours | |
| <input type="checkbox"/> Approvals | <input type="checkbox"/> Unit Change Requests (UCR) 1 hour | |
| <input type="checkbox"/> Schedule | <input type="checkbox"/> Unit Attributes Report | <input type="checkbox"/> Using Maps to support requests |
| <input type="checkbox"/> Hiring | <input type="checkbox"/> Using Vacant Unit Report (Combining Units) | |
| <input type="checkbox"/> Deadlines | <input type="checkbox"/> Value Pricing and Ranking 3 hours | |
| <input type="checkbox"/> Company Initiatives | <input type="checkbox"/> Discuss Pricing Tiers | <input type="checkbox"/> Show use of spread sheet and Maps to complete ranking |
| | <input type="checkbox"/> Location/Access are priority | <input type="checkbox"/> Re-rank a property |
| | | <input type="checkbox"/> Discuss Auto VP Ranking |

Day 3 / **7.75 hours**

Unique Customer Resolutions **2 Hours**

- | | |
|--|--|
| <input type="checkbox"/> Incidents (Internal/External) | <input type="checkbox"/> Customers without signed lease |
| <input type="checkbox"/> Subpoena/Warrants | <input type="checkbox"/> Termination or Possession/Eviction |
| <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> Customer calls to complain and you want to listen to call |
| <input type="checkbox"/> Active Military Customers | <input type="checkbox"/> Record Keeping |
| <input type="checkbox"/> Decedent Customers | |

RM Basics Overview

☐ RM Approval Limits

☐ Budgeting, Cash Flow, Financial Docs

☐ UKG Basics

☐ Auditing

☐ Tableau

Notepad

Academy

This is a good place to write down your logins, questions etc.



Lined area for writing notes.

Academy

