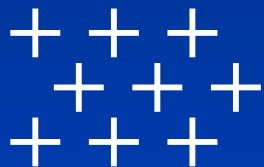




Technological Transformation: Evaluating and Adopting Contemporary Self-Storage Tools

Presented by:

Rob DuBroc, Founder, On Track Storage



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This will help us clear the stage and set the room for the next presenter. Plus, you’ll have 30 minutes to converse in an open, roundtable format.

THANK YOU!

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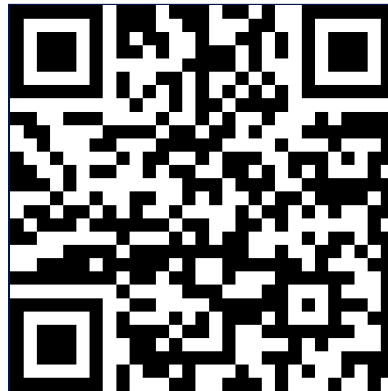


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My Journey: 1 Facility to 60+

2020: One facility, standalone phone, facility-management software and iPhone only, solo operator doing everything myself

2026: 43 owned, 60+ managed facilities, remote team, integrated tech stack, systems that scale

This is the story of that transformation...



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The Hawaii Wake-Up Call

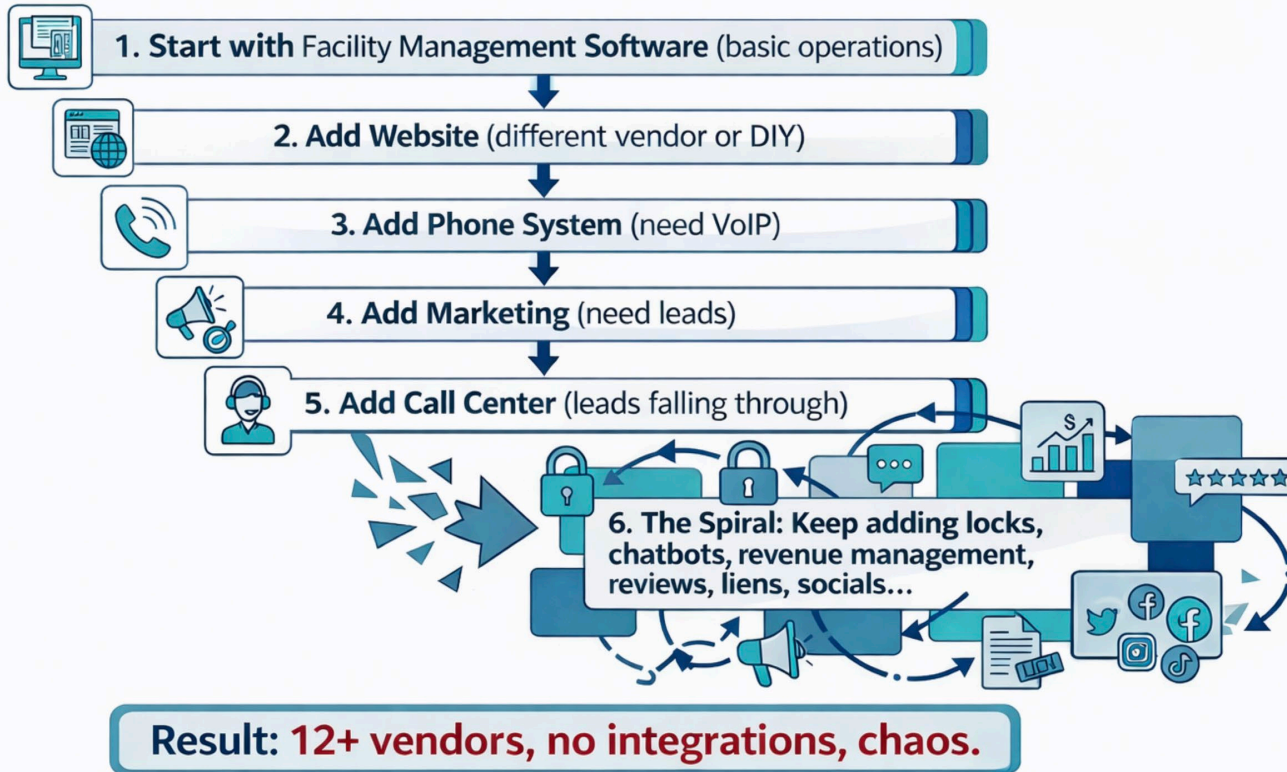
- In 2022, I owned three facilities. During a family vacation to Hawaii, I spent my mornings returning missed calls.
- My wife asked, "Is this your dream?"
- **Realization: I was the biggest bottleneck in my business.**



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The Typical Owner Journey



"Each decision made sense in isolation, but compounded into disaster."

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The 6 Failure Modes

1. Multiple “systems of record”

- Facility-management software has tenant and balance, CRM has separate leads, website has separate profiles
- Duplicates, mismatched info, “who is the customer” ambiguity

2. Pricing inconsistency across surfaces

- Website shows one price, software another, revenue management pushed on different cadence
- Refunds, concessions, staff overrides, loss of trust

3. Payments split across vendors

- Processor A online, B in-office, C for kiosk
- Reconciliation overhead, higher disputes, extra PCI compliance

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The 6 Failure Modes

4. Access/security not integrated with operations

- Gate codes and lock status outside delinquency process
- Manual overlocks, inconsistent enforcement, revenue leakage

5. “Suite + bolt-ons” without integration standards

- Platforms advertise integrations but depth varies
- Teams rely on spreadsheets and tribal knowledge

6. Too many communication channels

- Calls in one system, texts in another, emails in third
- Missed follow-ups, no conversation history, poor coaching

Rules to Keep Your Stack Lean

- **Declare one system of record.**
 - Your facility-management software is the source of truth. Everything else writes back or is just a “view.”
- **Prefer platforms supporting the full customer journey.**
 - Web, mobile, call center, automated gate codes end-to-end
- **Focus on integration non-negotiables.**
 - Real-time inventory and pricing, bidirectional sync, clean logs, exportability
- **Consolidate communications early.**
 - One VoIP, one texting platform, one CRM workflow
- **Do a “workflow audit” before adding any tool.**
 - Which workflow is broken? Which metric moves? Where's the source of truth?

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Messy vs. Clean

12+ Scattered Vendors

(The Cost of Chaos)

Fragmented Data in 5+ Places

Chatbots, Revenue Management, Socials, PMS, CRM, Website, Call System, Texting

SINGLE SOURCE OF TRUTH IMPOSSIBLE

\$2,500-\$4,000+ Monthly Cost

Redundant fees, tech bloat

Basic FMS Scale Bottleneck

Manual workarounds & fragile integrations break during updates



5-7 Integrated Components

Web/Mobile, Kiosk, Call Center, Automated Gate, Revenue Management

Real-time data synchronization

\$1,200-\$2,000 Monthly Cost

Real-Time Integration Non-Negotiables

Bidirectional sync, Real-time inventory/pricing, Clean logs

Eliminating manual data entry

PROPERTY MANAGEMENT SOFTWARE (PMS)

Updated in real-time

All data writes back to the PMS, ensuring the team knows exactly who the customer is without searching multiple systems.

KEY PRINCIPLES OF A LEAN STACK

- Declare One System of Record (PMS): PMS is the absolute source of truth.
- Support the Full Customer Journey: Platforms handle web to gate end-to-end.
- The 'Workflow Audit' Rule: Ask if it simplifies or complicates; if it requires a spreadsheet, it isn't truly integrated.

Manual Complexity vs. Automation

Cool tech adds complexity, managing multiple tabs & spreadsheets to bridge data gaps

THE BOTTOM LINE

(The ROI of Efficiency)

OVERSPENDING \$1,000/MONTH = \$12,000/YEAR LOST NOI

\$1k/mo Saved in Bloat

\$12k/yr Increased NOI

\$200k ENTERPRISE VALUE INCREASE (at 6% CAP rate)

CAPTURE THE '168-HOUR' OPPORTUNITY: A clean clack with AI 80s the 128 unstaffed hours in a week, exploring leads and rentals while you sleep for a fraction of the cost of a human team.

24/7 AI

Time Back for What Matters

Eliminating manual workarounds allows focus on growth rather than answering missed calls

NotebookLM

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Where the Savings Go

Cutting five or six vendors saves \$1,000 to \$2,000+ per month, hours of labor saved on manual workarounds

3 paths for savings:

- **Hire team:** Part-time customer-service rep, virtual assistant or third-party management
- **Advanced AI/tools:** AI-voice agents, call coaching and dynamic pricing (**HIGHEST LEVERAGE — 24/7 coverage**)
- **Increase cash flow:** If this is already dialed in, let the savings flow to the bottom line.



Vendor Red Flags

“Negotiate the divorce before making the wedding plans.”

Watch out for:

- Long-term contracts (anything over 12 months)
- Demanding three-year contracts with no exit on sale
- Hidden fees, unclear pricing escalators

Ask these questions **BEFORE** signing:

- What does offboarding look like?
- How long is this pricing locked?
- What data can I export if I leave?



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Vendor Evaluation: 4 Questions




“How do you **make me money, save me money, or save me a headache?**”


“What's your **edge**, and what stops competitors from copying?”


“How long is this pricing locked?”

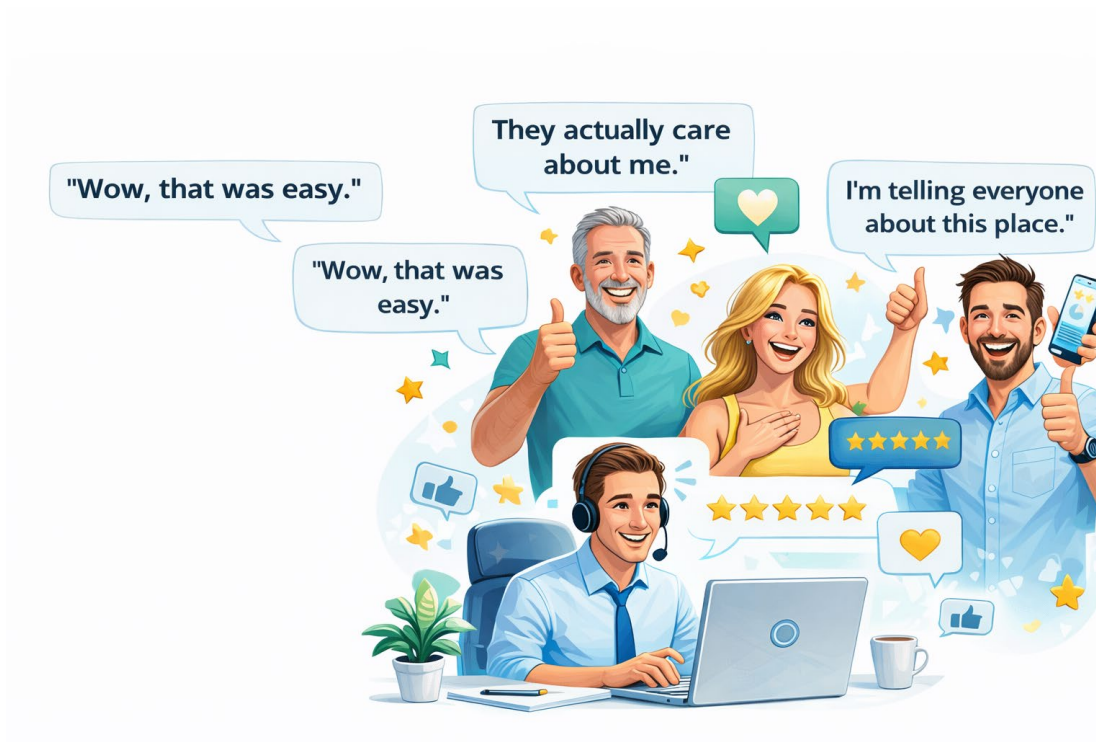

“What does offboarding **look like?**”

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Creating 'Raving Fans'

Technology should create moments that make customer say:



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Three 'Wow' Moments

1. Proactive rescue (abandoned cart)

- Before: Customer confused, walks away
- After: Customer-service rep calls within five minutes, saves the rental



2. Friction removal (easy payments)

- Before: Frustrated password resets, can't pay
- After: Easy checkout/no passwords



3. 24/7 availability (AI gate codes)

- Before: Angry voicemail at 9 p.m.
- After: AI delivers gate code instantly, anytime



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The Results

**20-30%
CONVERSION RATE
IMPROVEMENT**

**20-30% CONVERSION RATE
IMPROVEMENT YEAR OVER YEAR**

Streamlined Process

Faster
Response Time

Delighted Customer

More Rentals + Referrals

Enterprise Value



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The Math

There's 168 hours in a week!

- Most operators only staff *40 to 50 hours*.
- **That leaves 118 to 128 hours that are UNSTAFFED.**
- What happens when a customer calls at 9 p.m. on a Saturday?
- What happens when someone abandons a cart at 6 a.m.?



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AI: The Performance Enhancer

- If self-storage were an Olympic sport, AI would be banned. It's a performance-enhancing drug with no adverse side effects.
- **WARNING: increased productivity, revenue and customer satisfaction**



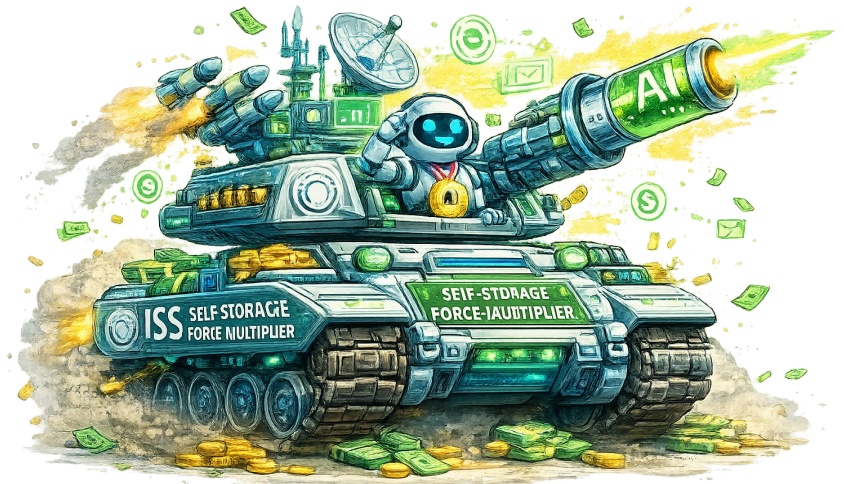
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AI as a Force Multiplier

Real examples from our operation:

- AI handles gate code requests while salesperson closes rental
- AI provides real-time call coaching and grading
- Pricing review for 60+ facilities in less than 10 minutes (vs. multi-hour manual process)



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Addressing Team Fear

Initial reaction: "Are you replacing us with a computer?"

The reframe:

- AI is a force multiplier, not a replacement.
- It handles the repetitive stuff so you can focus on what matters—rentals.

The breakthrough:

- The team saw AI call grading as a coach, not a critic.
- Now they use AI daily for emails, scripts, SOWs and problem-solving.

"Don't blindly trust, but lean in."

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Think Bigger: Your Options

The progression:

- **Tech first:** Plug the holes with the right tools.
- **Fractional team/third-party management:** Get professional management support.
- **Full-time team:** Scale when volume justifies it.

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A Word of Warning

"If you're a dentist, you should be fixing teeth, not answering storage calls."

Don't pawn this off on your spouse.

I've seen that movie.

It ends in burnout or divorce.

Get help!



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Don't Jump Over Dollars

"I was jumping over dollars to save dimes."

- Cheap tools that don't integrate create expensive problems.
- The right investment in technology pays for itself in saved time, captured leads and happy customers.

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The Bottom Line

“Don't throw money at marketing if you can't catch the leads.”

Architect your tech stack to:

- Plug the holes
- Delight the customer
- Empower your team

Whether you have a single facility or 60, and whether you self-manage, hire a team or work with a third-party manager, the principles remain the same.

The final question: Are you going to keep doing it the hard way or build the business you actually wanted?

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Rob DuBroc

Founder/CEO

On Track Storage

785.840.5260

rob@ontrackstorage.com

www.ontrackstorage.com



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