

Self Storage New Employee Training and Development Plan

WEEK 1				
Scheduled Date	Learning Objective	Responsible Person	Training Materials	
Day 1	<input type="checkbox"/> Welcome	Regional Supervisor		
	<input type="checkbox"/> Complete New Hire Paperwork	HR Director or Regional Supervisor	HKP Empl Handbook	
	<input type="checkbox"/> Employee benefits & compensation, HKP policies and procedures			
	<input type="checkbox"/> Gain a basic understanding of the self storage industry: past, present, future. <input type="checkbox"/> Understand your role within the company structure - job description <input type="checkbox"/> Review regional and district structure and a list of key contact members <input type="checkbox"/> Be introduced to trainer & training property	Regional Supervisor		
Day 2	<input type="checkbox"/> Shadow Trainer throughout a typical work day from WinSen Start of Day to End of Day	Trainer	WinSen Manual	
	<input type="checkbox"/> Read Chapter 1 and 2 of Self Storage Operations Manual (Leasing / Marketing & Advertising) & Chapter 1 (Introduction) of WinSen Manual	Self Study	SS Ops Manual / WinSen Manual	
Day 3	<input type="checkbox"/> Review Chapter 1 and 2 of Self Storage Operations Manual & Chapter 1 of WinSen Manual	Trainer	SS Ops Manual / WinSen Manual	
	<input type="checkbox"/> Shadow Trainer throughout a typical work day from WinSen Start of Day to End of Day	Trainer	WinSen Manual	
	<input type="checkbox"/> Read Chapter 3 and 4 of Self Storage Operations Manual (Ancillary Income / Climate Control) & Chapter 2 (Daily Operations) of WinSen Manual	Self Study	SS Ops Manual / WinSen Manual	
Day 4	<input type="checkbox"/> Review Chapter 3 and 4 of Self Storage Operations Manual & Chapter 2 of WinSen Manual	Trainer	SS Ops Manual / WinSen Manual	
	<input type="checkbox"/> Learn how to track demand by observing Trainer entering all potential customer information on tracking log <input type="checkbox"/> Review basic operations and maintenance of standard office equipment (changing ribbons, clearing printer jams, etc.) <input type="checkbox"/> Learn, practice and be able to demonstrate these basic WinSen functions <ul style="list-style-type: none"> <input type="checkbox"/> Daily Charger <input type="checkbox"/> View/Edit Tenant - Table <input type="checkbox"/> Canceling a Transaction <input type="checkbox"/> Payments <input type="checkbox"/> Assign Tenant 	Trainer	Tracking Log	
				Practical Application
				Self Study
	<input type="checkbox"/> Read Chapter 5 and 6 of Self Storage Operations Manual	Self Study	Self Storage Ops Manual	
Day 5	<input type="checkbox"/> Review Chapter 5 and 6 of Self Storage Operations Manual (Fair Housing / Grounds & Curb Appeal)	Trainer	Self Storage Ops Manual	
	<input type="checkbox"/> Understand the importance of a properly executed lease and be able to make a thorough, customer-centered lease presentation	Trainer		

	<input type="checkbox"/> Observe and be able to demonstrate the proper way to show a unit to a customer and what sales points are best made while on the property with the customer	Trainer	
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WEEK 1

Scheduled Date	Learning Objective	Responsible Person	Training Materials
Day 5 (Continued)	<input type="checkbox"/> Study, then discuss the following with your Trainer <ul style="list-style-type: none"> <input type="checkbox"/> Renting process - lease <input type="checkbox"/> Move-in process <input type="checkbox"/> Vacating space <input type="checkbox"/> Bank cards <input type="checkbox"/> Delivery Acceptance <input type="checkbox"/> 24-hour access 	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Understand how to maintain the retail inventory in WinSen	Trainer	
	<input type="checkbox"/> Learn, practice and be able to demonstrate these basic WinSen functions <ul style="list-style-type: none"> <input type="checkbox"/> Start of day <input type="checkbox"/> End of day <input type="checkbox"/> Move-in <input type="checkbox"/> Move-out <input type="checkbox"/> Move-out notices 	Trainer	WinSen Ops Manual
	<input type="checkbox"/> Learn, practice and be able to demonstrate these basic WinSen functions <ul style="list-style-type: none"> <input type="checkbox"/> Credits <input type="checkbox"/> Cancelled payment 	Trainer	WinSen Ops Manual
	<input type="checkbox"/> Know how to execute the following accounting tasks: <ul style="list-style-type: none"> <input type="checkbox"/> Cash Reconciliation <input type="checkbox"/> Invoices <input type="checkbox"/> Check Request <input type="checkbox"/> Petty Cash <input type="checkbox"/> 	Trainer	WinSen Ops Manual

	Request for Refund		
	<input type="checkbox"/> Read Chapter 7 and 8 of Self Storage Operations Manual (Delinquencies & Auctions / Security)	Self Study	Self Storage Ops Manual

I have completed week one of new employee training as outlined above. I have had the opportunity to discuss my questions and concerns with those who have provided my training.

Employee: _____

Trainer: _____

Date: _____

Date: _____

WEEK 2

Scheduled Date	Learning Objective	Responsible Person	Training Materials
Day 6	<input type="checkbox"/> Review Chapter 7 and 8 of Self Storage Operations Manual	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Review Self Storage Operations Manual Test	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Wait on customers. (Each customer interaction to be followed by “feed forward” debrief and coaching with Trainer)		
	<input type="checkbox"/> Complete daily tasks as agreed upon with Team Trainer	Trainer	
	<input type="checkbox"/> Call three other HKP properties and assess the salesperson’s skills; discuss with Trainer	Trainer	
	<input type="checkbox"/> Wait on customers at every opportunity, continuing the review process	Trainer	
	<input type="checkbox"/> Read Chapter 9 and 10 of Self Storage Operations Manual (Inventory Control / Equipment)	Self Study	Self Storage Ops Manual
Day 7	<input type="checkbox"/> Review Chapter 9 and 10 of Self Storage Operations Manual	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Visit Board Ripple & Self Storage of America to become familiar with properties and meet team members	Self	
	<input type="checkbox"/> Read Chapter 11 and 12 of Self Storage Operations Manual (Utilities / Budgets)	Self Study	Self Storage Ops Manual
Day 8	<input type="checkbox"/> Review Chapter 11 and 12 of Self Storage Operations Manual	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Visit Carmel Drive SS to become familiar with property and meet team members	Self	
	<input type="checkbox"/> Wait on customers. (Each customer interaction to be followed by “feed forward” debrief and coaching with Trainer)	Trainer	
	<input type="checkbox"/> Read Chapter 13 and 14 of Self Storage Operations Manual (Legal Issues / Conflict Management)	Self Study	Self Storage Ops Manual
Day 9	<input type="checkbox"/> Review Chapter 13 and 14 of Self Storage Operations Manual	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Review WinSen applications	Trainer	WinSen Ops Manual
	<input type="checkbox"/> Complete WinSen Practical Application Test	Self	
	<input type="checkbox"/> Review WinSen Practical Application Test	Trainer	
	<input type="checkbox"/> Read Chapter 15,16, and 17 of Self Storage Operations Manual (Safety & Emergency Procedures / Snow & Ice Procedures)	Self Study	Self Storage Ops Manual
Day 10	<input type="checkbox"/> Review Chapter 15,16, and 17 of Self Storage Operations Manual	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Review Learning Objectives from Days 1-9, discussing questions and concerns with the Trainer	Trainer	
	<input type="checkbox"/> Complete daily tasks as agreed up with Trainer	Self	
	<input type="checkbox"/> Wait on customers at every opportunity, continuing the review process	Self	

I have completed week two of new employee training as outlined above. I have had the opportunity to discuss my questions and concerns with those who have provided my training.

Employee: _____

Trainer: _____

Date: _____

Date: _____

WEEK 3

Scheduled Date	Learning Objective	Responsible Person	Training Materials
Day 11	<input type="checkbox"/> Study and understand the following:	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Customer complaints		
	<input type="checkbox"/> Claims management		
	<input type="checkbox"/> Government agency information/access requests		
	<input type="checkbox"/> Cash management		
	<input type="checkbox"/> Robbery prevention		
	<input type="checkbox"/> Know how to complete an Incident Report	Trainer	Self Storage Ops Manual
	<input type="checkbox"/> Wait on customers at every opportunity, continuing the review process	Self	
	<input type="checkbox"/> Review collection & foreclosure process	Trainer	Self Storage Ops Manual
Day 12	<input type="checkbox"/> Learn and understand property reporting procedures	Trainer	Weekly/Monthly Reports
	<input type="checkbox"/> Understand the purpose and content of each basic store financial reports	Trainer	Monthly Financial Report
	<input type="checkbox"/> Wait on customers at every opportunity, continuing the review process	Self	
	<input type="checkbox"/> Be familiar with the process for changing rates & completing rate increases	Trainer	
	<input type="checkbox"/> Complete daily tasks as agreed upon with Trainer	Self	
Day 13	<input type="checkbox"/> Wait on customers at every opportunity, continuing the review process	Self	
	<input type="checkbox"/> Review WinSen applications	Trainer	WinSen Ops Manual
	<input type="checkbox"/> Complete daily tasks as agreed upon with Trainer	Trainer	
Day 14	<input type="checkbox"/> Work the property "alone," with the Trainer only being available to observe and answer critical questions	Trainer	
Day 15	<input type="checkbox"/> Review previous day's experiences and clear up any misunderstandings	Trainer	
	<input type="checkbox"/> Work the property alone for the remainder of the day with the Trainer being available to observe and answer critical questions	Self	

I have completed week three of new employee training as outlined above. I have had the opportunity to discuss my questions and concerns with those who have provided my training.

Employee: _____

Trainer: _____

Date: _____

Date: _____

Scheduled Date	Learning Objective	Responsible Person	Training Materials
Weeks 4 - 5 Fri - Week 5	<input type="checkbox"/> Review Chapters 1 - 4 <input type="checkbox"/> Test on Chapters 1 - 4	Self Staff	Ops Manual Ops Manual
Weeks 6 - 7 Fri - Week 7	<input type="checkbox"/> Review Chapters 5 - 10 <input type="checkbox"/> Test on Chapters 5 - 10	Self Staff	Ops Manual Ops Manual
Weeks 8 - 9 Fri - Week 9	<input type="checkbox"/> Review Chapters 11 - 15 <input type="checkbox"/> Test on Chapters 11 - 15	Self Staff	Ops Manual Ops Manual
Weeks 10 - 11 Fri - Week 11	<input type="checkbox"/> Review Chapters 16 - 18 <input type="checkbox"/> Test on Chapters 16 - 18	Self Staff	Ops Manual Ops Manual
<p align="center"><i>I have completed the new employee training as outlined above. I have had the opportunity to discuss my questions and concerns with those who have provided my training.</i></p>			
Employee: _____		Trainer: _____	
Date: _____		Date: _____	