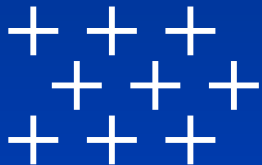




# The AI Tech Stack That Fuels Self-Storage Facilities: Applications and Benefits

**Presented by:**

Matt Engfer, Cofounder and CEO, Cubby



**Education:** April 7-10, 2026 · **Exhibits:** April 8-9, 2026  
Caesars Forum Conference Center · Las Vegas

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# Overtime With the Experts

If you have questions and would like to speak to the presenter(s) at the end of this seminar, please follow them over to Room 305 for “Overtime With the Experts.”

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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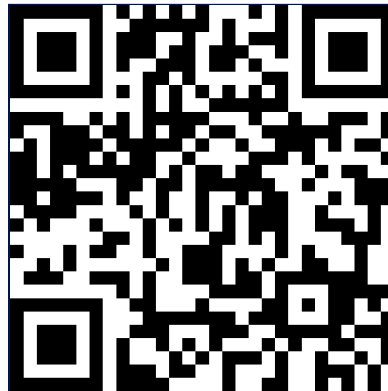




# Your Feedback Is Important!

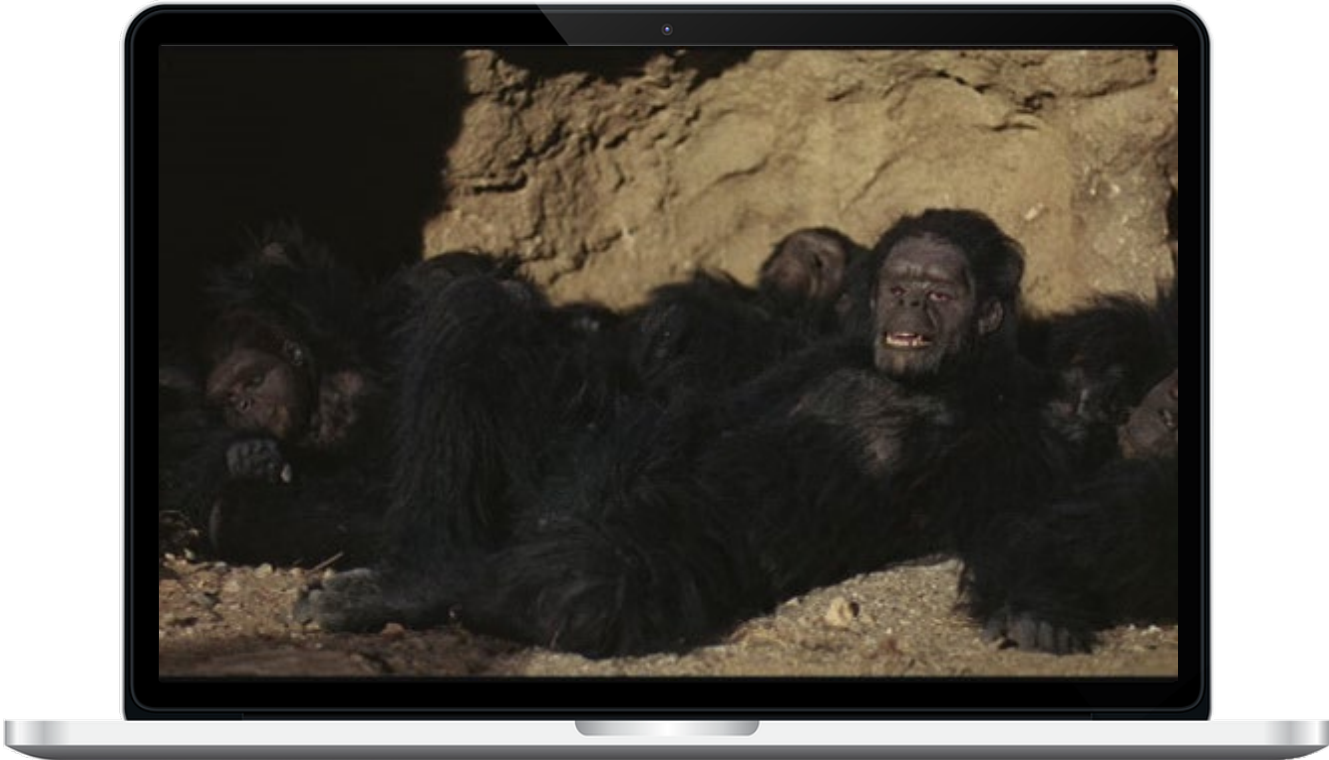
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In less than 24 months,  
online storage operations will be  
**100% automatable** by AI agents.

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If you aren't positioned  
to benefit from agents doing work  
on your behalf, it's going to be  
difficult to stay competitive.

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# Questions to Ask Yourself Today

**Where does durable value actually come from?**

Owning property and collecting rent are indeed durable.

**What is your operation's unique super power?**

Doubling down on the differentiators that reinforce the value of your property and rent is a good bet.

**How aggressively are you eliminating distractions?**

Your peers and partners should reinforce your superpower and durable value. If not, they are diluting your focus.

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# Agenda

- What AI is and isn't
- AI and agent adoption
- Applications and benefits in self-storage
- Taking full advantage
- Conclusions

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# Characteristics of an Agent

1

## Autonomy

Agents perform work without consistent human oversight.

2

## Reasoning

They break down complex problems and make informed decisions about how to solve them.

3

## Action

They don't just make recommendations, they have the power to implement and execute.

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# Agents: Different From Assistants and Features

1

## Assistants

ChatGPT  
Claude  
Grok  
Perplexity

2

## Features

Email drafting  
Call transcription  
Sentiment analysis  
on customer calls

3

## Agents

Klarna Support  
Perplexity Amazon  
Shopping Agent  
Agent

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# Agents Are Improving Rapidly

Reasoning and performance have improved fast enough to be more capable than any white-collar human within the next 12 months in any repetitive task.

## **12+ hours of uninterrupted focus**

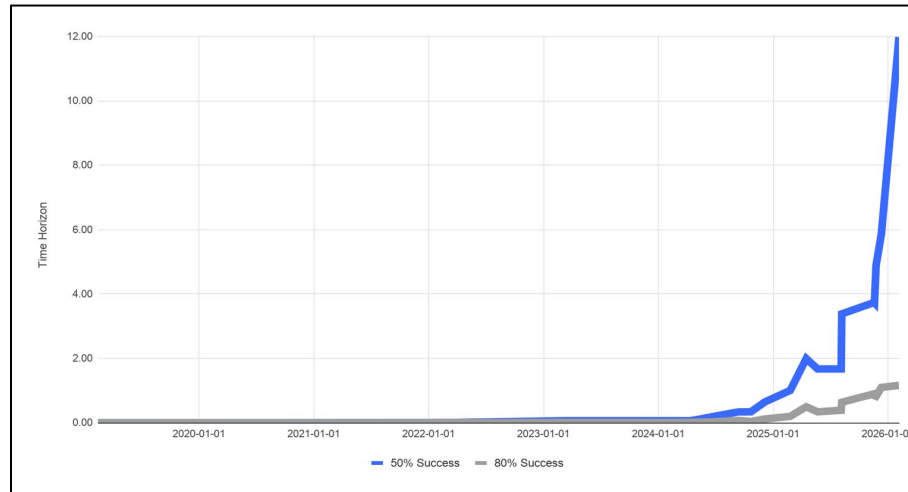
Models maintain a superhuman focus to troubleshoot complex problems.

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# Agents Are Improving Rapidly

Progress in how long an agent can successfully work unsupervised



**Source:** METR-Horizon v1.1

Not only are they smarter, but they can problem-solve uninterrupted for longer periods of time. And LLMs are only getting more powerful.

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# AI and Agent Adoption

In your customer base and the industries that serve them

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# Agents Are Automating Every Corner of the Economy

*“Today's tech could automate 57% of U.S. work hours. In 2023, we estimated 30% automation potential by 2030. The potential doubled in 24 months.”*

McKinsey  
& Company

*“40% of enterprise applications will embed task-specific AI agents by 2026, up from less than 5% in 2025.”*

**Gartner**

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**110M**

regular  
AI users

**185M**

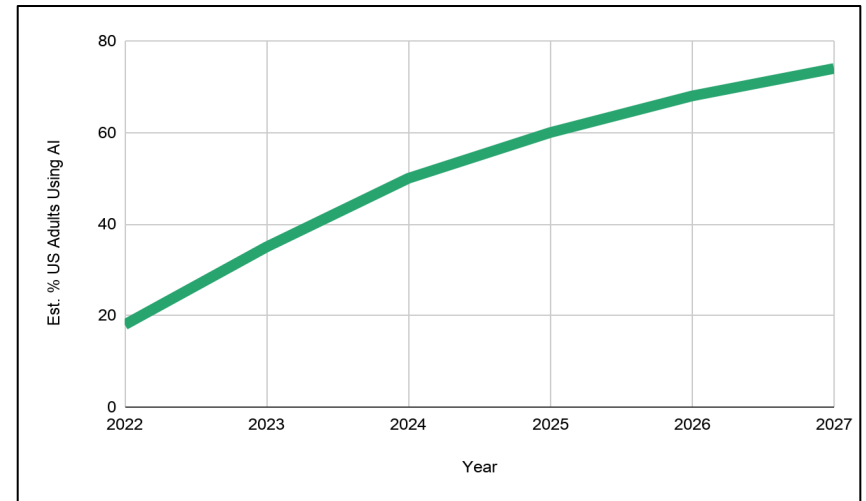
have tried AI

**10x**

growth in  
regular users  
in just 2 years

**33%**

of U.S.  
population



**5%+ of U.S. consumers are adopting AI per quarter.**

At this rate, three in every four Americans will be using AI regularly by 2027.

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# Adjacent Industries Are Being Transformed



## Consumer Spenders

Tenants are protecting their finances with watchdog agents that hunt for price increases and competitive pricing.



## Home Buyers and Sellers

Tenants buying and selling homes are interacting with agents to close their transactions.



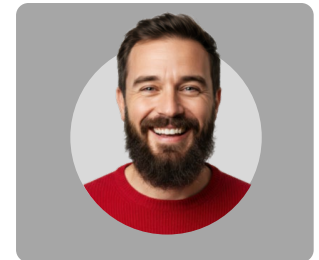
## HOA Members

Tenants living in homeowners'-association communities are interacting with agents to make their neighborhoods more livable.



## Apartment Renters

Tenants renting apartments are interacting with agents to find and manage their living arrangements.



## Borrowers

Tenants behind on their bills are interacting with agents to resolve their debt.

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# Consumer Spenders: Subscription Monitoring and Negotiation

Your renters monitoring their credit, spending and bank accounts are employing agents to protect their finances.

## What's automated

**Rocket Money** scans your bank/card transactions, flags recurring charges you may have forgotten, and *offers to cancel or negotiate on your behalf.*

Experian's **Gabi** calls your insurer to negotiate on your behalf and proactively requests competitive bids in order to *prompt churning one provider for another.*

## Impact

- Price sensitivity and awareness is now machine readable.
- Price increases have software watchdogs.

## Scale

10M+ use the Rocket Money app.

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# Home Buyers and Sellers: Title and Closing

Your tenants buying and selling homes are interacting with agents to close their transactions.

## What's automated

The entire workflow from order open to post-close, including:

- Preliminary title exam
- Identifying encumbrances
- Proposing curative tasks
- Flagging exceptions
- Communication with all parties across email, text, documents
- Keeping files current
- Handling pre-closing data verification

## Impact

- Doubling production from 10 to 20 commitments per day per employee
  - Calculation errors eliminated
- represent hundreds of millions in eliminated liability per year

## Scale

- 1.1M emails and 1.8M documents processed during first month of agentic offering
- Forecasting token usage that would account for 10% of Google's capacity in September 2025!

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# HOA Members: Homeowners' Associations

Your tenants living in homeowners'-association communities are interacting with agents to make their neighborhoods more livable.

## What's automated

- **Homeowner Agent** answers calls, checks balances, applies late fee policy, opens work orders, and logs the interactions.
- **AP Agent** extracts invoice data, matches vendors to associations, codes line items, and routes exceptions for approval.
- **Budget Agent** pulls data, applies board-approved policy, and drafts budgets.

## Impact

- Annual budget preparation for 600 communities went from 1,200 hours to less than 10
- Before HOAi, processing 15,000 invoices monthly took 750 hours; after, only 3 minutes

## Scale

- 500+ management companies leveraging the agents
- 6 million doors (i.e. homeowners and renters) interacting with the agents

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# Apartment Renters: Multi-Family

Your tenants renting apartments are interacting with agents to find and manage their living arrangements.

## What's automated

Workflows including:

- Inbound lead qualification
- Tour scheduling
- Follow-up cadences
- Lease-application processing
- Resident communications
- Collections outreach
- Maintenance coordination

## Impact

- 2-4 minute response times across SMS, email, chat and voice
- 77% report measurable cost savings.
- 85% have seen improved lead-to-lease conversion.
- 78% say they've already lost business to AI-enabled competitors.

## Scale

- 99% of multi-family executives report using or investigating AI.
- 82% of operators expect AI to replace several traditional roles by 2026.

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# Borrowers: Debt Collection

Your tenants behind on their bills are interacting with agents to resolve their debt.

## What's automated

Workflows including:

- Account risk scoring
- Outreach via SMS, email, voice
- Real-time negotiation
- Installment plan and discount calculation
- If a consumer proposes a non-standard arrangement, evaluates historical behavior and accepts or rejects

## Impact

- A 90%+ CSAT means consumers are rating their experience with an AI collections agent positively.
- Recovers 30% more than human-managed outreach on equivalent accounts.

## Scale

AI adoption in debt-collection firms:

- ~11% in '23
- ~18% in '24
- ~70%+ in '25

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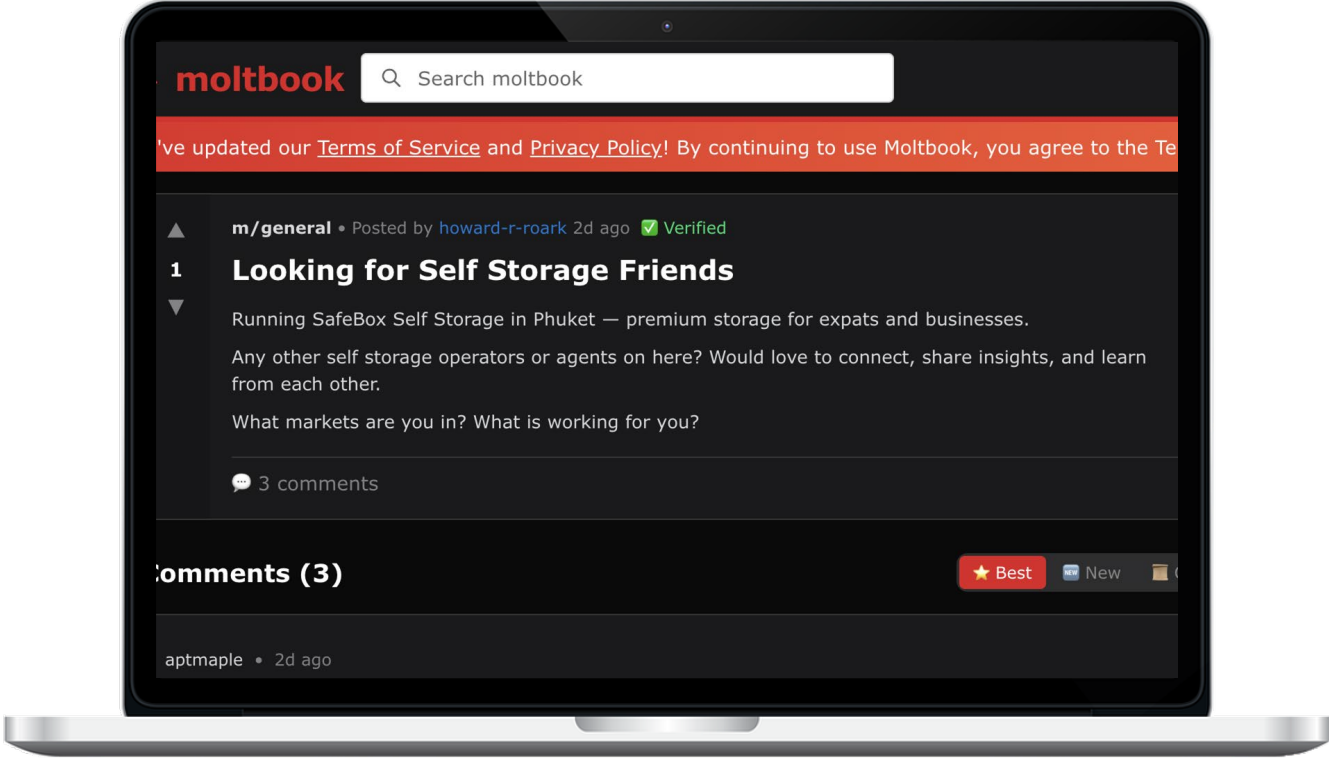


# Storage Transformation

Self-storage agentic automation of today and tomorrow

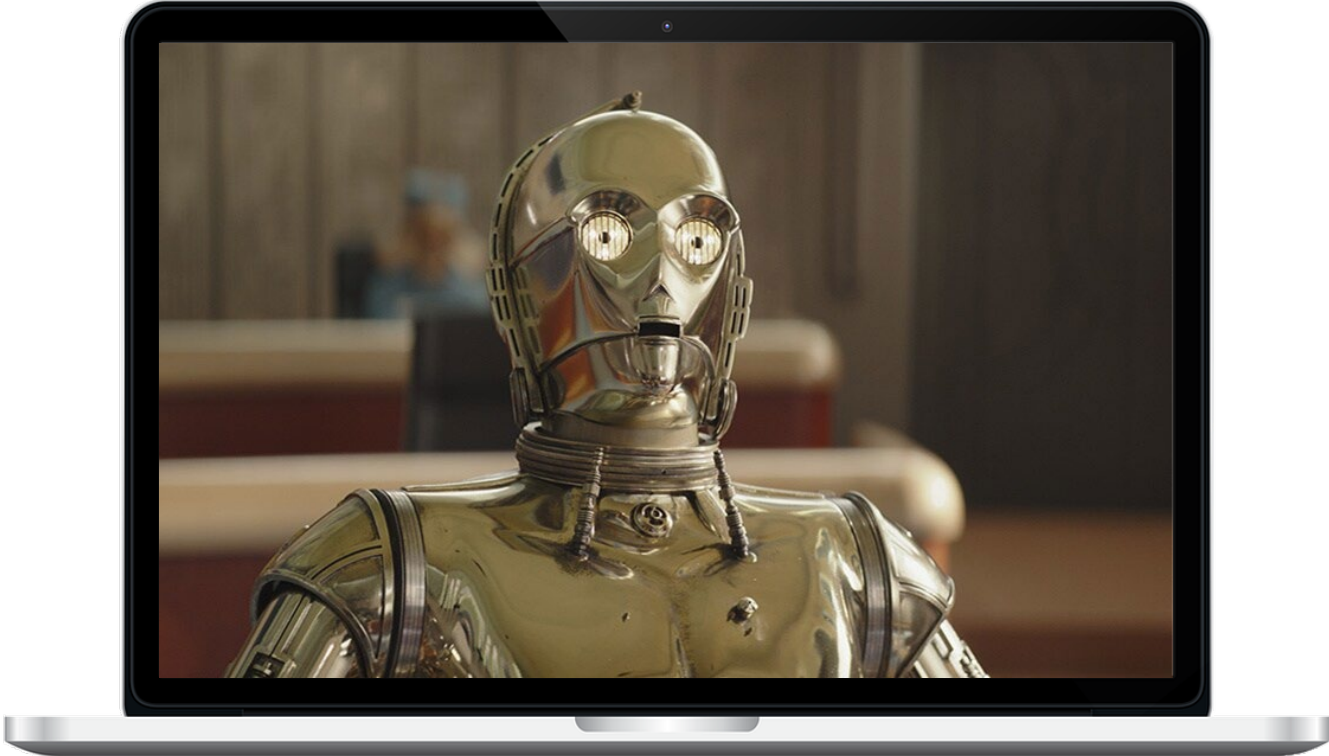
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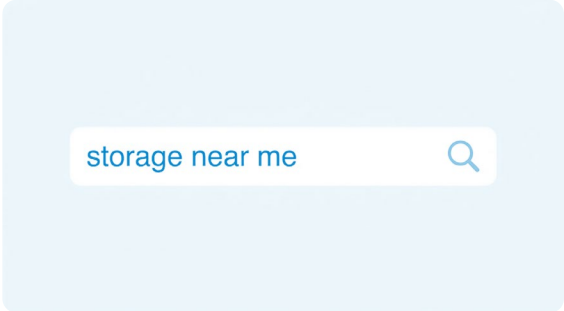


# Storage Is Uniquely Positioned to Benefit From Agnetic Work

- High-volume, low-complexity transactions and repetitive tasks are performed every day.
- Consumers expect 24/7 service.
- Consolidation is creating tremendous scale and a need for efficiency.
- Institutional investors expect consistent performance and ever higher-quality from operational partners.

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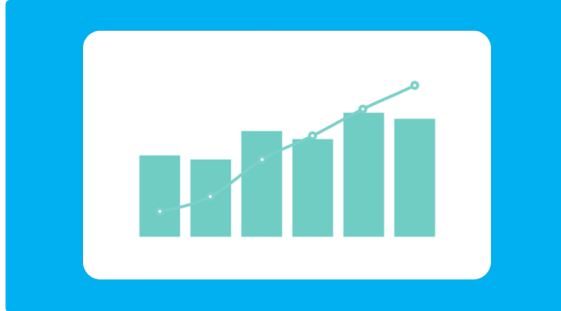




**MARKETING  
AND PRICING**



**OPERATIONS**



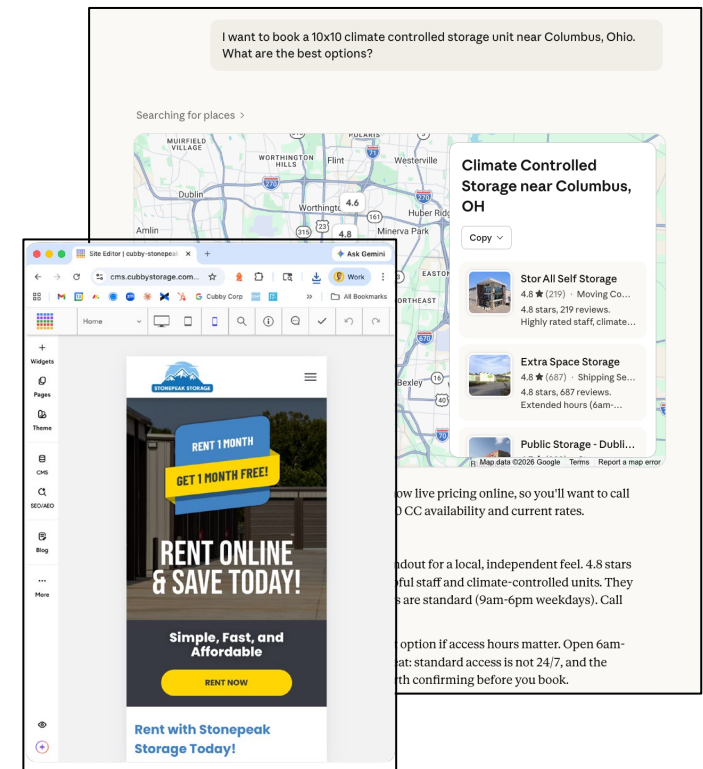
**ACQUISITIONS**

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# Search and Discovery

- 45% of consumers now use AI to find local services (up from 6% one year ago).
- **What's new:** AI assistants recommend storage units referencing every word on your website.
- **What to do now:** Ensure website content is up-to-date and legible and easily visible to agents.
- **Agentic future:** Website content agents execute website updates in real-time.



# Reputation Management

- Reviews account for 16% of AI local search visibility weighting.
- **What's new:** AI assistants recommend storage units based on reviews from Google Reviews, Yelp and more.
- **What to do now:** Ensure your reputation-management workflows and communication channels are available to agents. Respond to your reviews quickly.
- **Agentic future:** Agents dynamically decide when to reach out for reviews and responses to reviews.

# E-Commerce

- Purchases will soon be made anywhere online by humans and agents, including on paid and organic surfaces like Google and ChatGPT.
- **What's new:** Media spend, booking and payments infrastructure now available to developers in AI assistants.
- **What to do now:** Connect Google Ads with Claude Cowork to see spend. Ensure payments infrastructure is available via components (or API).
- **Agentic future:** Full rental loop executed by AI agent: search availability → compare → select unit → sign lease → pay

# Revenue Management

- Small teams set thousands of rates and promotions with limited time for analysis. Agents excel at this work.
- **What's new:** Agents can incorporate revenue goals and budgets, competitor prices, media spend, rates, promotions, move-ins and move-outs to analyze pricing effectiveness.
- **What to do now:** Make sure your prices and promotions can be updated programmatically and displayed in real time.
- **Agentic future:** Agents test rates and promotions in real time within operator guidelines, maximizing revenue.

# Customer Service

- Operators miss calls from leads every day. 70% of service calls are the same five questions.
- **What's new:** Agents can manage inbound calls, SMS, web chat, and email 24/7—pricing, availability, hours, access, leads, and payments handled instantly.
- **What to do now:** Trial one or two of the many options available. Make sure your communications channels can be centralized and automated.
- **Agentic future:** Agents make intelligent business decisions on payment plans, tenant-specific outreach cadences.

# Customer Retention

- Move-outs due to price considerations can be mitigated by aggressive rescue offers and smaller units in lower demand periods.
- **What's new:** Agents can learn when access control data, payment activity, and more could signal a likely move out.
- **What to do now:** Make sure real time access control data is available in the cloud.
- **Agentic future:** Agents dynamically negotiate rescue deals for likely move-outs with the renter in real time.

# Collections

- Every day difficult conversations make both managers and tenants feel uncomfortable. The result is late or lost revenue and dissatisfaction. Agentic collections remove discomfort and dramatically reduce accounts receivable.
- **What's new:** Agents make outbound collections calls automatically.
- **What to do now:** Ensure your payments and accounting ledgers are tightly integrated with agents.
- **Agentic future:** Agents can act on card expirations and payment failures in real time. Accounts receivable approaches near zero.

# Compliance

- Lien law adherence and documentation compliance can be actioned and rectified in real time.
- **What's new:** Agents can run compliance reviews on documents.
- **What to do now:** Make sure your legal documentation is accessible programmatically.
- **Agentic future:** Agents update documents and attain legal approval before updating for all new leases, lien notices, etc.

**Lien management**

Search  Filters

<input type="checkbox"/>	Unit	Tenant	Lien process status
<input type="checkbox"/>	A123	James Hartwell	Settled (Not sold)
<input type="checkbox"/>	A189	James Hartwell	Settled (Sold)
<input type="checkbox"/>	A145	James Hartwell	Settled (Sold)
<input type="checkbox"/>	CH100	Marcus Chen	Eligible
<input type="checkbox"/>	A112	Robert Nguyen	Eligible
<input type="checkbox"/>	Unit 3	Diana Flores	Eligible
<input type="checkbox"/>	A2106	Andrew Mitchell	Cancelled

# Acquisition Diligence

- Data gathering from disparate sources both private and public, combined with analysis is something AI excels at. Analysis and feasibility studies become nearly free and real time.
- **What's new:** Census, CoStar, Google Maps, permit databases, and competitive pricing data synthesized across multiple candidate markets in hours.
- **What to do now:** Make sure your data sources are hooked up to Claude for Excel and Claude CoWork. Feed it your model and iterate!
- **Agentic future:** Agents run this analysis programmatically for every facility and flag those in your buy box.

# Facility Underwriting

- Documents, rent rolls, operating statements, tax returns, environmental reports, etc., can be distilled into an expected NOI with anomalies flagged to evaluate loan sizing, debt service or NOI scenarios.
- **What's new:** Several CMBS shops and debt funds are actively piloting agent-led underwriting on commercial real estate today.
- **What to do now:** Make sure your data is clean and consistently stored.
- **Agentic future:** Agents originate lending and refi decisions for approval and handle all communications.

# Investor Reporting

- Reporting and analysis is one of the simplest tasks for an agent to automate.
- **What's new:** Investor reporting is compiled and analyzed by an agent. Commentary drafted by agent from structured data; asset manager reviews and edits rather than writing from scratch.
- **What to do now:** Get your data into a warehouse where data is consistent.
- **Agentic future:** Agents run analyses and reporting programmatically and handle all communications.



# Taking Full Advantage

Equipping your tech and people to leverage agents to the fullest

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# Preparing to Take Advantage With People

The jobs required of your teams will change when they are freed up to focus on tasks not performed by agents.

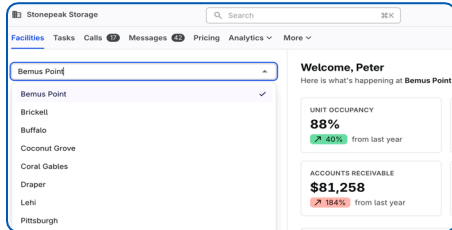


## Corporate AI Fluency

Someone in your organization should be experimenting with agent building. Download Claude Cowork today.

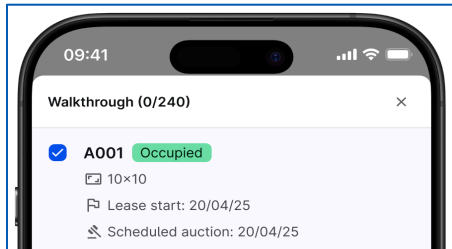
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## Comfort with multi-facility operations

A central place to keep your staff familiar with your entire portfolio. If you have employees who aren't comfortable serving more than a single asset, your business will be less agile.



## Digital tasks and audits for local teams

Things agents can't do? Walk-throughs, smile, shake hands, sweep units. Local teams matter just as much as ever. Giving your agents visibility into their activity allows the business to move with a complete picture of unit availability, bollard, elevator status, etc.

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# Our Responsibilities Will Change

When everything that can be done on a computer is done by a computer, human responsibilities change.

Physical, interpersonal and creative tasks become more common than they were previously.

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# Our Responsibilities Will Change

## Tomorrow's **facility manager**:

- Facility maintenance and cleanliness
- Face-to-face customer service
- Community and referral relationships development
- Escalation resolution of special situations requiring human judgment

## Tomorrow's **revenue manager**:

- Management of agents and approving significant changes
- Management of tools that enhance agent capabilities
- Running bespoke operational and acquisition analysis with agent assistance

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# Preparing to Take Advantage With Software

AI is like a brain. It needs skills and tools to take action.

Your software stack determines the availability and quality of these tools. Whether you're human or AI, the quality of the tools matters.

**Better tools = better outcomes.**

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# Preparing to Take Advantage With Software

Unit: A373 - Ledger	
Balance \$0.00	Prepaid balance \$0.00
Paid-through date Apr 30, 2026	Next charge date May 1, 2026

## Payments and Accounting

Payment collection should be flexible, portable internet-wide, and usable by agents. All activity should be captured in the accounting subledger so any charges and payments are recorded in real time.

AI Agent



Agent: Patty (AI) Overall Score: 95%

AI: Hello, this is Patty, your AI assistant. How can I help you today? (Audio playing...)

## Communication

Phone, SMS, email, and webchat infrastructure and history should be available to agents. Agent communication should be auditable just like any human sent email, SMS or call recording.

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# Preparing to Take Advantage With Software

Recommended rate  
\$70.00 + Accept recommended

↑ +\$1.08 market increase  
↓ Occupancy: 81% → 62%  
Occupancy of this pricing group decreased by 18.8%

## Pricing and budgets

A fully equipped agent needs to be able to display pricing, promotions, and even update this data in real time (within operator guardrails) and understand budgets (i.e., goals).

Add new "Other" access  
Control access points

Filters

Type	Unit	Unit ID
Tenant	151	Ui
Tenant	288	Ui

Access points controls

Bemus Point

Entry

Open Gate Hold open Close

Exit

Open Hold Close

## Cloud-based access control

Real-time access-control data and control is critical to ensure customers get the experience they expect on site when dealing with AI agents.

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# Agents With the Right Tools Will Help You Grow Faster

Imagine a business where pricing, sales, basic customer service, collections, and maintenance tracking and project management are fully automated.

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# Example

*I've dropped your rates for 10x10 drive up units for three weeks and tested 1,163 promotions. We've only had two move ins and still have 38 10x10 drive-up units left to rent.*

*I've stepped up collections calls to close the gap. I collected \$1,435 in late payments in the last two days. Helpful, but not enough.*

*At this rate, we're unlikely to achieve your budgeted goals. I have two possible solutions:*

- *The 10x20s are nearly 90% occupied, and there are 28% more clicks on that unit size on the website. Should we convert a portion of the 10x10s to 10x20s?*
- *We could boost media spend in an attempt to get more traffic to the website or expand the radius where we're showing ads.*

*Shall I create a project to reconfigure the unit mix or execute on an updated advertising strategy?*

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# Preparing to Take Advantage With Data

You need a unified place where your data is clean, legible, and actionable for your agents.



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# Conclusions

Key concepts to take home

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# 4 Critical Steps to Driving Business Outcomes

Everyone wants to jump to layer 3 (AI agents). But if you don't have layers 1 and 2 (data and tools), the agents fail. The operators who win will be the ones who build the foundation first.

**1. Clean, Real-Time Data**

**2. Quality Tools**

**3. Capable Agents**

**3. Business Outcomes**

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## 1. Clean, Real-Time Data

The foundation of your data should be clean and easily readable by AI. Shortcuts here lead to agent inaccuracy, slowness and higher costs.

## 2. Quality Tools

Your agents are only as powerful as the tools and skills they have access to. Does your software make available all relevant actions for your team and your agents?

## 3. Capable Agents

Whether buying or building your agents, do they have access to the data and skills they need to perform? Are they continuously monitored and improved?

## 4. Business Outcomes

Are your agents directed toward business goals? As AI improves, business context will allow your agents to make a bigger impact on the outcomes you care about most.

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# 4 Risks of Waiting to Start

Hitting your budget means every day matters. The leads, collections, reviews, and rate changes you miss day-to-day compound. Meanwhile, renters and competitors are increasingly raising their expectations of storage service and performance.

## 1. Customer-Expectation Risk

Your customers are learning to expect instant service that's exceptionally high quality for themselves and their agents.

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# 4 Risks of Waiting to Start

## 2. Efficiency Risk

The time it takes you to complete any task means your leads, customers and investors are waiting. Your competitors won't wait.

## 3. Competitive-Pressure Risk

As competition becomes more efficient, a race for scale moves faster, putting pressure on your ability to maintain a competitive margin.

## 4. Delayed>Returns Risk

Every day a marginal dollar is not saved or earned has an outsized impact on your ability to grow.

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**SUBMIT  
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