



**HUMIDITY  
CONTROLLED**

**INVESTOR DAY**

**21 NOVEMBER 2018**

# WELCOME AND INTRODUCTION

ANDREW CATSOULIS  
MANAGING DIRECTOR



# OPERATIONS

JAMES KIERNAN  
GENERAL MANAGER - OPERATIONS





# OPERATIONAL PLATFORM



PROPERTY

PROCESS

CUSTOMER

PEOPLE

PRODUCT

B28

B29

B30

B31

# OPERATIONS

SCALABLE & EFFICIENT

- Drive organic growth
- Increase customer satisfaction
- Achieve operational excellence
- Develop team capability
- Effective asset management



# CONTACT CENTRE

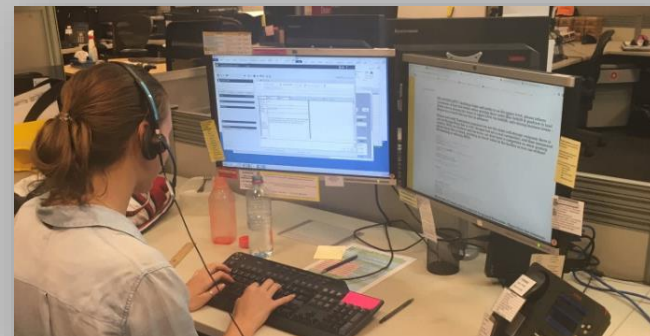


**SPECIFIC FOCUS**

**OMNICHANNEL**

## CONTACT CENTRE TRANSFORMATION

- Improved customer experience
- Improved contact centre and team efficiency
- Improved response times and conversion



# THIRD PARTY LOGISTIC SOLUTIONS (3PL)

## Storage

- Multiple Forward Service Locations (FSLs)
- Multiple technician hubs

## Service

- Full inventory management
- Pick & Pack
- Delivery
- 24 hour service

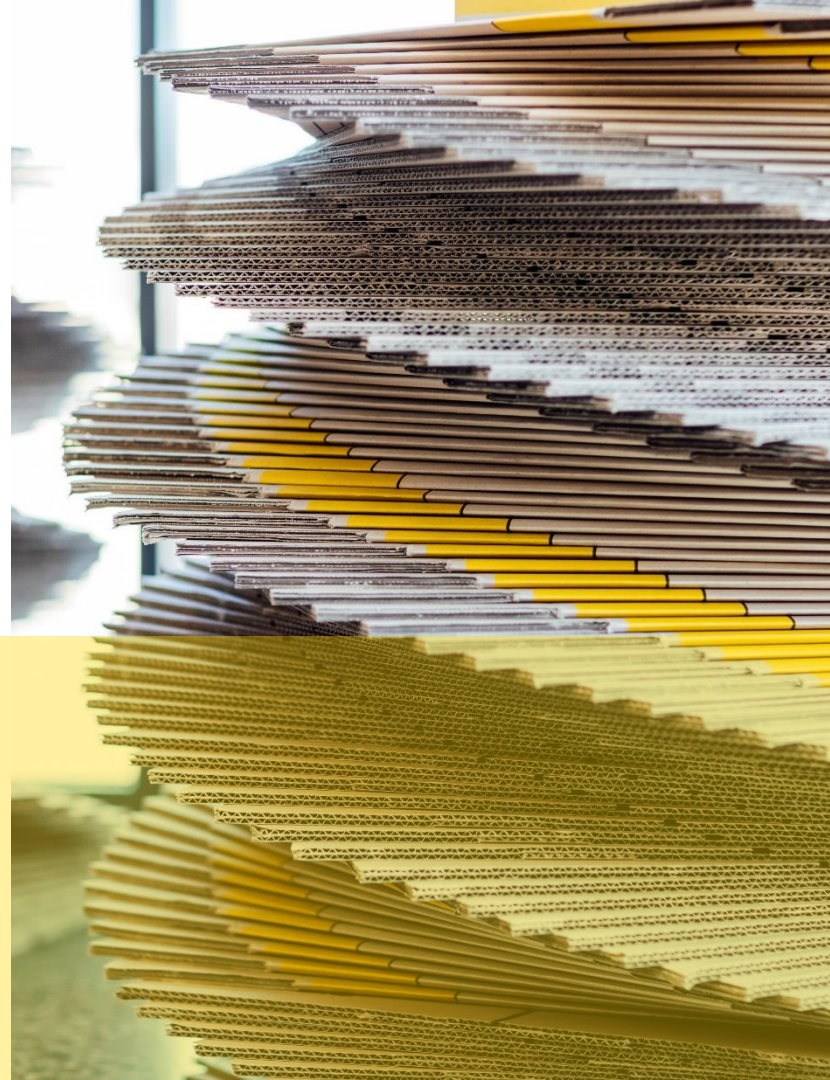
## Business Outcomes

- Higher yield per sqm
- Service offering for a niche market
- No additional resources



# REVENUE MANAGEMENT

MICHAEL LEE  
SENIOR COMMERCIAL ANALYST  
REVENUE MANAGEMENT





# KEYS OF REVENUE MANAGEMENT

## ■ PRODUCT

- Unit sizing
- Customer service
- Ancillary services

## ■ PLACE

- Location
- Contact channels
- Unit layout

## ■ PRICE

- Competitor analysis
- Customer behaviours
- Unit specific pricing



# STRATEGY

MAXIMISE REVENUE (REVPAM) WHILST  
MAINTAINING OCCUPANCY GROWTH



- Maximise revenue
- Maintain occupancy growth
- Centre specific strategy
- Creating value

## Revenue Optimisation

Unit rates

Promotions

Occupancy  
Supply/  
Demand

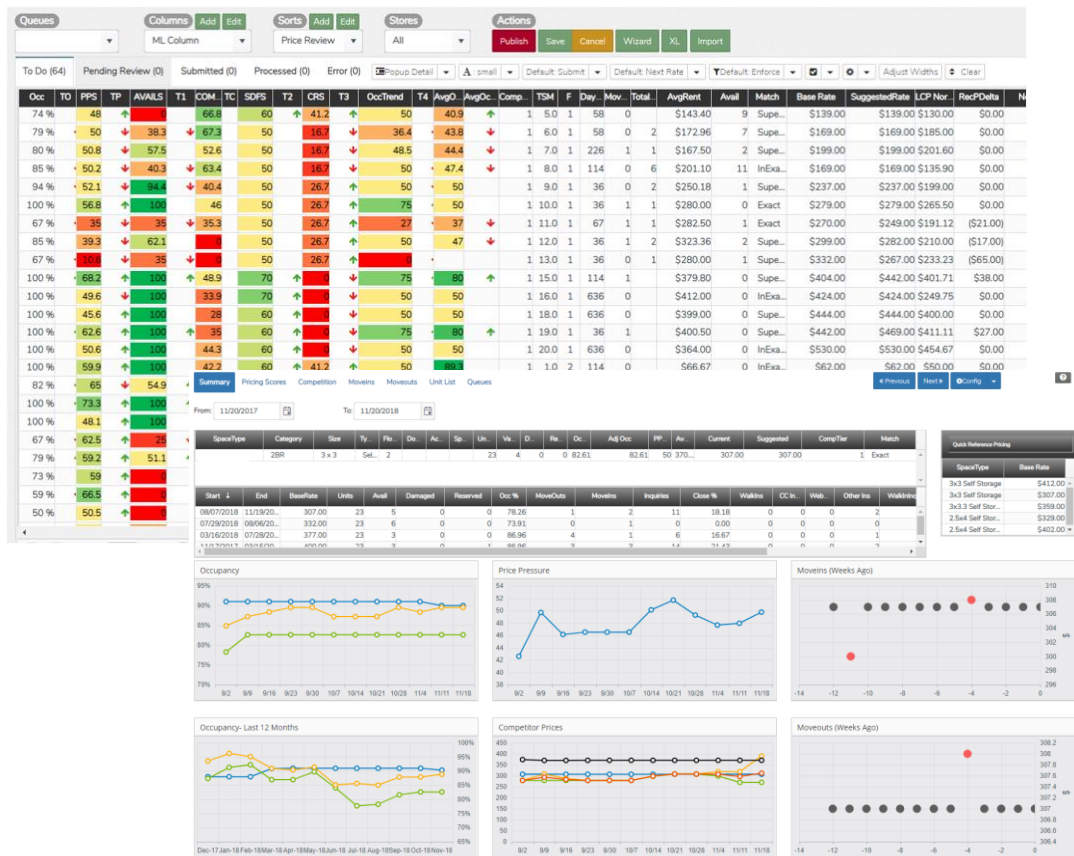
Competitors

Utilisation

Timing

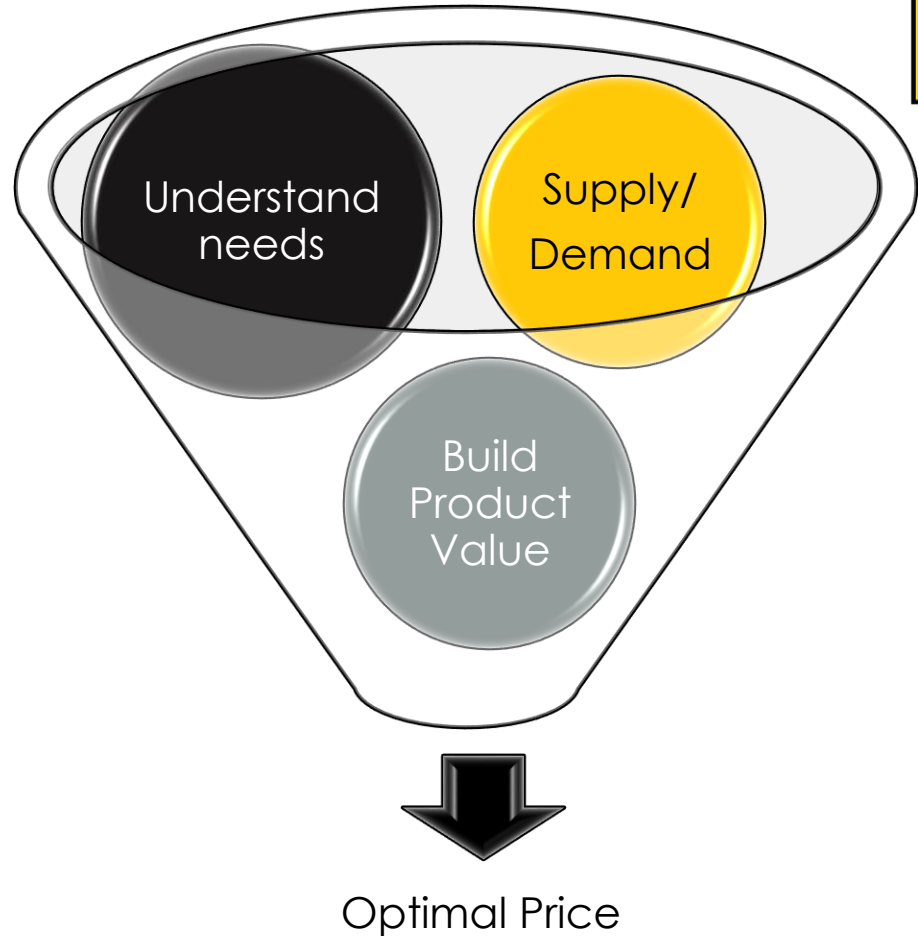
**NATIONAL  
STORAGE**

- Fully supported and client specific advice
- Competitor data
- Trend indicators
- System recommended rate
- Human factor



## Unit Desirability Index (UDI)

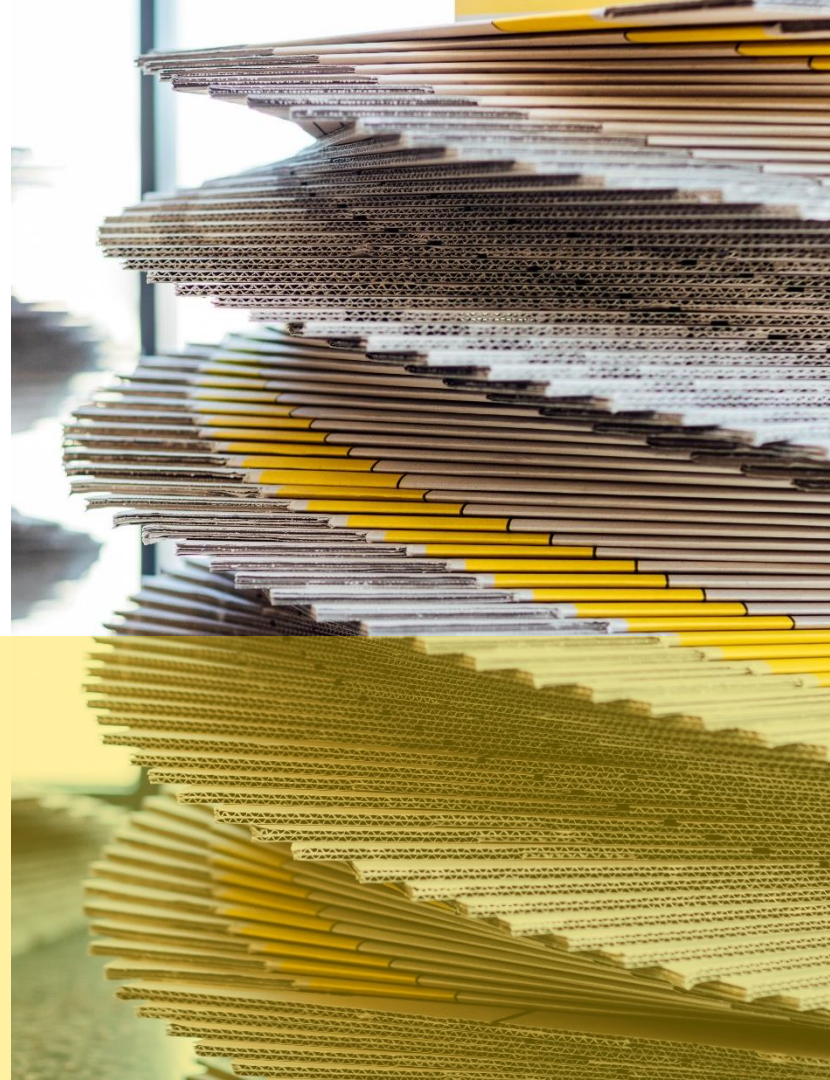
- Simplified sales process
- System upgrades pricing automatically
- Meet customer need at optimal price



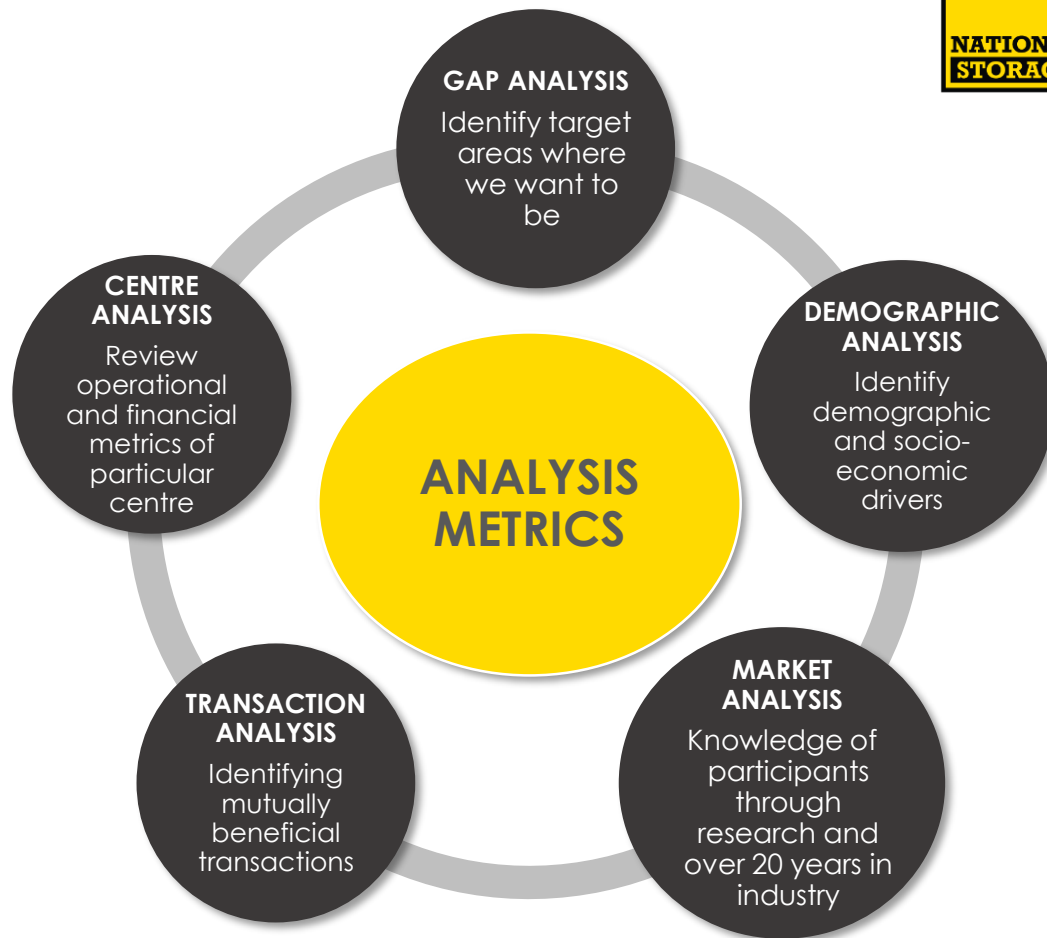


# ACQUISITIONS

KRISTY CHERRY  
GENERAL MANAGER ACQUISITIONS &  
SPECIAL PROJECTS

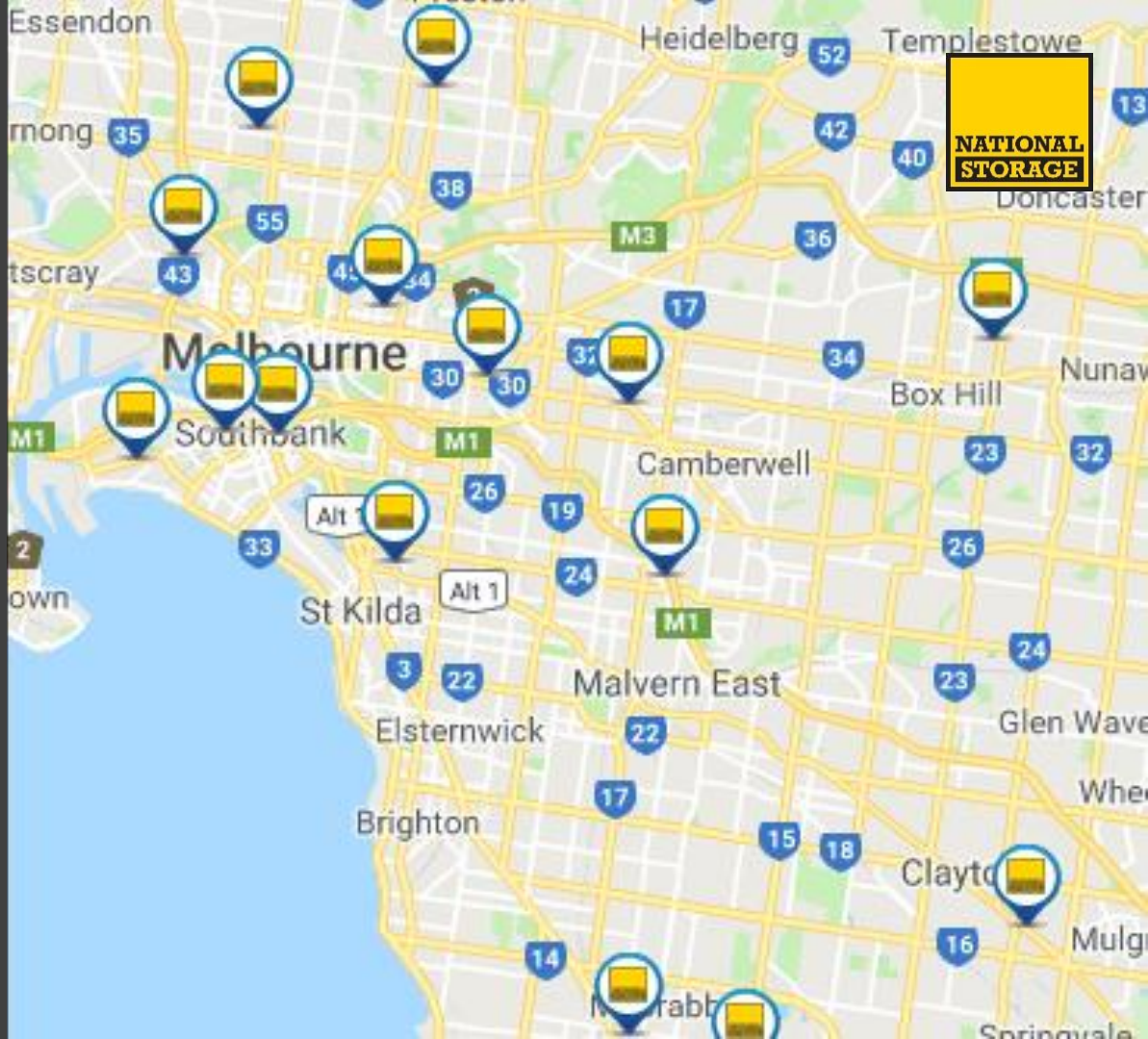


# IDENTIFY ACQUISITION OPPORTUNITIES



## ACQUISITION PIPELINE

- Strong Pipeline
- \$100m under active consideration
- Highly fragmented industry



# ACQUISITION AND INTEGRATIONS PROCESS

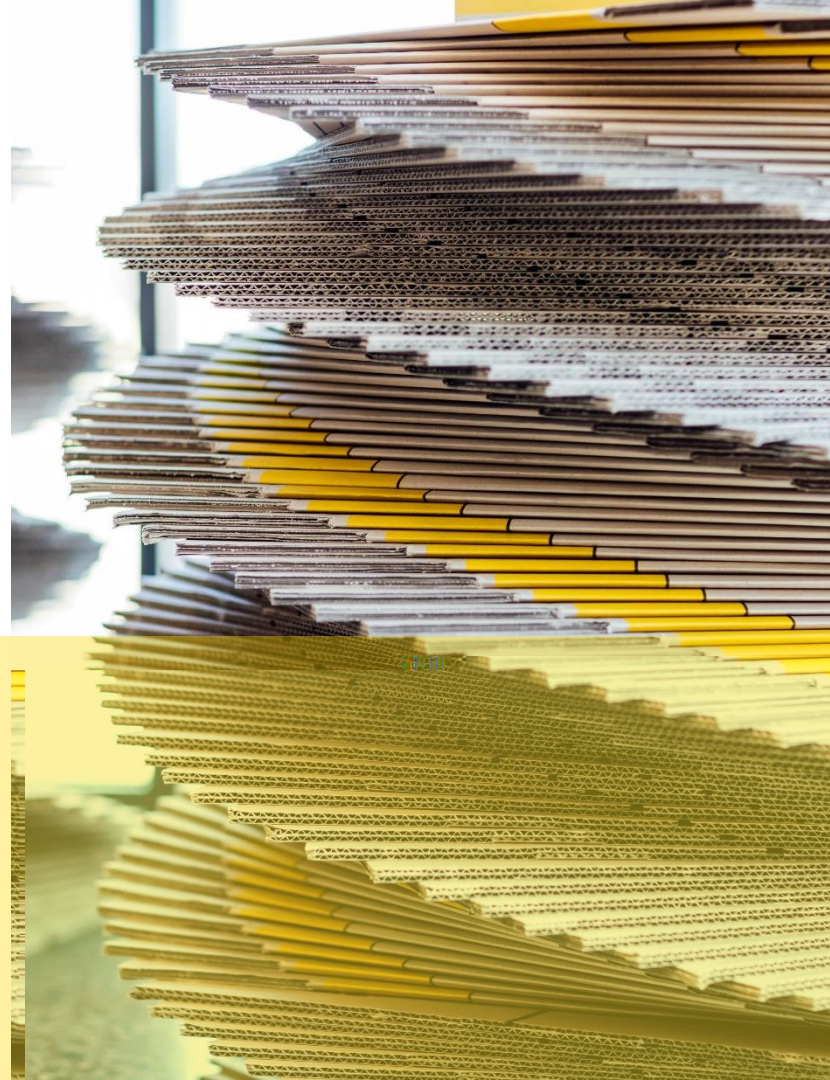




# MARKETING & TECHNOLOGY

MARCUS BARRON  
GENERAL MANAGER TECHNOLOGY

*"To be the enabler of business success and take National Storage to greater levels of efficiency, while improving the customer experience."*



# MARKETING - STRATEGY

- Increase brand awareness
- Increase product offering awareness
- Deliver quality enquiries
- Improve conversion rates and channel efficiency
- Scalable, measurable platform

Insights



Strategy



Execution



Review

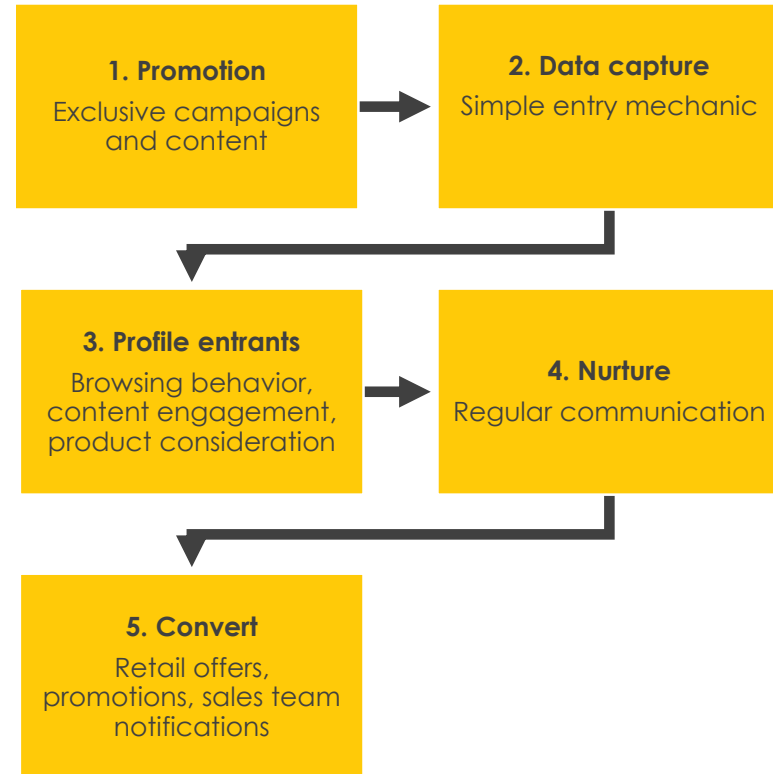


# MARKETING – SPONSORSHIP



# MARKETING - SPONSORSHIP

- Driving brand awareness
- Building positive brand association
- Engaging with fans via game day activations and digital campaign initiatives
- Keeping National Storage front of mind on an ongoing basis

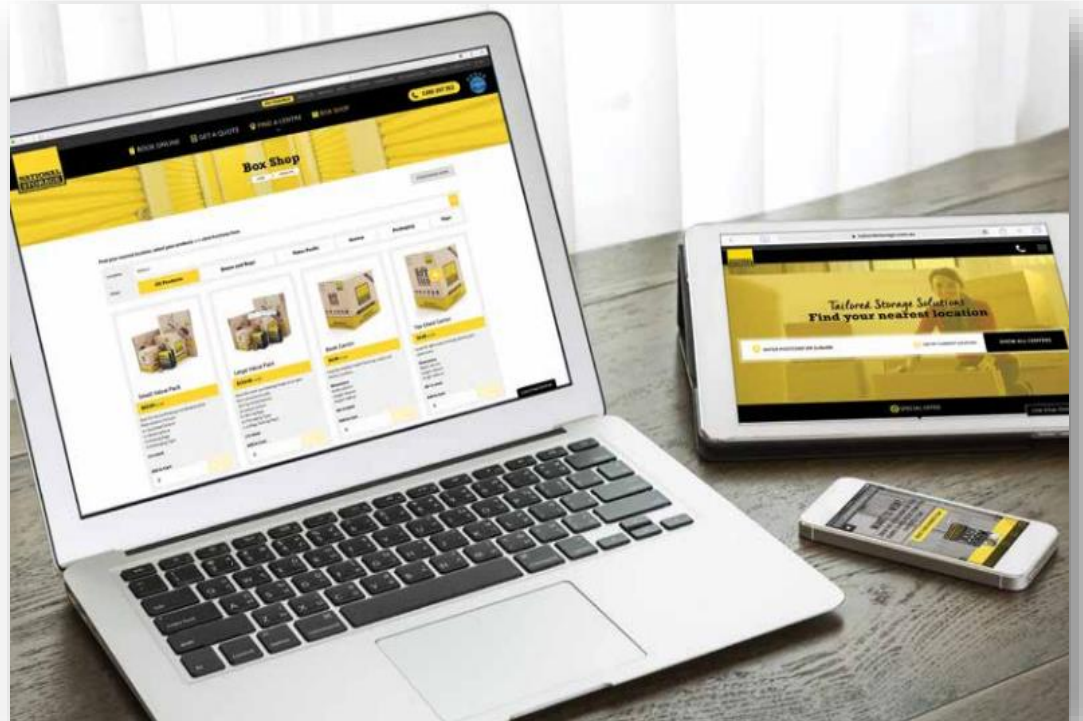




# INSIGHT DRIVEN DECISION-MAKING

## CUSTOMER FOCUS

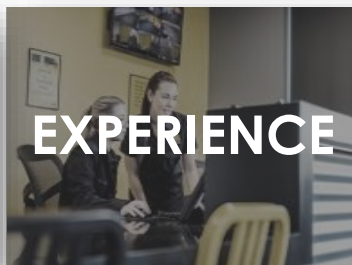
- Marketing & Technology working together to develop custom insights and analytics platform
- Turning customer interactions into marketing insights
- Marketing automation to deliver efficiencies and target specific market segments
- Embracing digital transformation – paperless move-ins, app development and enhancing the digital customer experience



# TECHNOLOGY STRATEGY



## ANALYTICS



## IT INFRASTRUCTURE

# AUTOMATION DRIVING OPERATIONAL EFFICIENCY



## ENQUIRY PROCESS

- Custom developments to streamline enquiry process in the Contact Centre
- Provides competitive advantage in the information we track on customers and how we interact electronically
- The next step in our fully automated customer experience
- Opens up new revenue opportunities without additional resourcing and proves concept for online click-through marketing

Username:  Password:

**ENQUIRY SUBMISSION**

New Enquiry Search Enquiry Logout

Service Enquiry Save to Stelink Close Enquiry

1,149 - Rothwell

Change Log

Tenant Info:

Tenant Name: Michael NP

Email:

Address:

Phone Numbers:

Pin code: 380876044

Location: L149

Tenant ID: 494938

Email:

Items to be stored:

Situation / package:

Customer is sending to store a vehicle

Customer left this comment in the enquiry:

As this is an email enquiry, limited information has been provided. Quoting a range of both a hardstand and a driveway unit.

Customer is to be followed up, to see if the email was received. Run through the quote, answer any questions/objections and secure the booking.

How soon?

How long for?

Do you need Packaging?

How often do you need access?

Unit Refresh

Unit Discounts

Unit Rates

Unit Select

Unit Name	W	L	Price	Location	Floor
0362	3	5.5	270	L149	0
\$030	3	5	112	L149	0

### Unit Search for L149 - Rothwell

Unit Type	Size	Floor	Name/Number	Facil	Add (Units)	Est		
Unit Type	Size	Floor	Name/Number	Facil	Add (Units)	Est		
Unit Name	Width	Length	Area	Price	Unit Type	Unit Notes	Occupancy %	UnitID
0300	3.0000	6.0000	18	\$112	Hardstand	Hardstand storage	74.0741	130289
0301	3.0000	6.0000	18	\$112	Hardstand	Hardstand storage	74.0741	130275
0304	3.0000	6.0000	18	\$112	Hardstand	Hardstand storage	74.0741	130276
0457	3.0000	6.0000	18.0	\$340	Self Storage 3	Self Storage 3	87.1435	136137
0676	3.0000	6.0000	18.0	\$381	Self Storage 3	Self Storage 3	87.1435	135390
0362	3.0000	6.0000	18.0	\$270	Self Storage 0	Self Storage 0	88.0000	135161
0363	3.0000	6.0000	18.0	\$270	Self Storage 0	Self Storage 0	88.0000	135162
0366	3.0000	6.0000	18.0	\$270	Self Storage 0	Self Storage 0	88.0000	135164
0368	3.0000	6.0000	18.0	\$270	Self Storage 0	Self Storage 0	88.0000	135165
0369	3.0000	6.0000	18.0	\$270	Self Storage 0	Self Storage 0	88.0000	135166

Showing 1 to 10 of 72 selected row selected

Site Name	Distance KM	Unit Name	Width	Length	Area	Price	Unit Type	Unit Notes	Occupancy %	UnitID
Cabot Road South	15.93	0003	3.0000	6.0000	18	\$07	Hardstand	Hardstand storage	61.5305	38778
Cabot Road South	15.93	0004	3.0000	6.0000	18	\$07	Hardstand	Hardstand storage	61.5305	38779
Cabot Road South	15.93	0005	3.0000	6.0000	18	\$07	Hardstand	Hardstand storage	61.5305	38777
Cabot Road South	15.93	0016	3.0000	6.0000	18	\$07	Hardstand	Hardstand storage	61.5305	38829
Cabot Road South	15.93	0019	3.0000	6.0000	18	\$07	Hardstand	Hardstand storage	61.5305	38862
Aspley	17.37	810	3.0000	6.0000	18	\$384	Self Storage 3	Internal unit second floor	87.5000	34468
Aspley	17.37	803	3.0000	6.0000	18	\$384	Self Storage 3	Internal unit second floor	87.5000	34730

# ENHANCING OUR ASSETS

## USING TECHNOLOGY TO EXTRACT FURTHER VALUE FROM REAL ESTATE ASSETS

### • SOLAR POWER

- Stream 1: 54 Storage Centres, 4000 Solar Panels and cost savings of \$400k/year
- Stream 2: 57 Storage Centres, 6000 Solar Panels and further cost savings

### • TELECOMMUNICATIONS

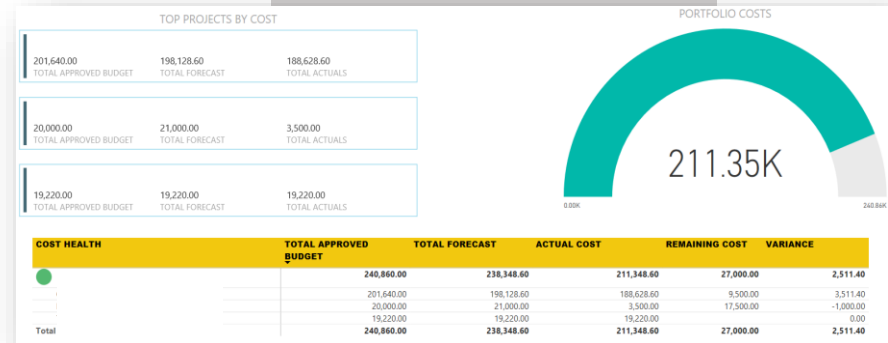
- Working with major telecommunications providers to position mobile towers on assets (over 15 NS properties to date)
- Investigating opportunities with tier-two telecommunications providers to deliver multiple revenue streams from telco sector





# PROJECT MANAGEMENT FOCUS

- New Project Management Office (PMO) structure
- Real-time access to progress on all projects through Project Dashboards
- Enhances ability to deliver projects on-time and on-budget
- Provides visibility for better oversight
- Improves scalability of the platform and facilitates delivery of multiple projects more efficiently





# PEOPLE

## MANNY LYNCH- PEOPLE

*"Attract, Engage and Retain the Right People to increase Performance through building a Safe, Healthy, Motivated and Capable Workforce."*



# NATIONAL STORAGE PEOPLE

ATTRACT

ENGAGE

RETAIN

SAFELY

NATIONAL  
STORAGE



# PEOPLE

432

HEAD OFFICE	51
CONTACT CENTRE	27
CENTRE STAFF	354





# ATTRACT

- Multi-disciplined business role opportunities
- Personalised development plans
- Values in action
- Dedicated Recruitment Manager



# ENGAGE

- Challenge often, reward excellence
- Let the leaders lead
- Sense of common purpose
- Embrace technology
- Wellbeing for yourself, not by yourself





# RETAIN

- Celebrate milestones
- Demonstrated career pathways
- Recruit complimentary skillsets
- Being part of the journey



# SAFELY

No Harm to Anyone at Anytime

- 24/7
- Whole of person
- Everyone's responsibility
- Reward and recognise



# ASSET TOURS

FORTITUDE VALLEY  
KELVIN GROVE  
SPRINGWOOD  
NERANG  
CARRARA  
ROBINA  
BUNDALL





# FORTITUDE VALLEY

114 MONTPELIER ROAD, BOWEN HILLS QLD 4006

NUMBER OF UNITS

732

NLA

6,900sqm

OCCUPIED NLA %

82%

OCCUPIED WINE VAULTS

95%

## FEATURES

- Fully trained Storage Consultants
- Different sized units including bulk storage & mini warehouse storage (over 30sqm)
- CCTV camera surveillance
- Pin coded access 7 days
- Self-managed records management
- Climate controlled storage
- Good lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Specialist wine storage
- Individually alarmed unit doors
- Undercover loading docks/area



# KELVIN GROVE

345 KELVIN GROVE ROAD, KELVIN GROVE QLD 4059

NUMBER OF UNITS

562

NLA

5,600sqm

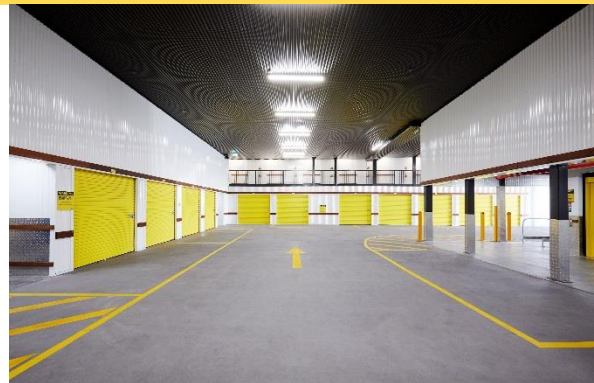
OCCUPIED NLA %

57%

OPENED NOV 2017

## FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Self-managed records storage
- Undercover car storage
- Internal warehouse (multi-level)
- Humidity controlled storage
- Truck, caravan & boat storage (hardstand)
- 24hr access
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Industrial bins available
- Individually alarms unit doors
- Undercover loading docks/areas





# SPRINGWOOD

3421 PACIFIC HIGHWAY, SLACKS CREEK QLD 4127

NUMBER OF UNITS

644

NLA

6,300sqm

OCCUPIED NLA %

82%

## FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Pin coded access 7 days
- Truck, caravan & boat storage (hardstand)
- 24hr access available
- Driveway access
- On site industrial bins
- Individually alarmed unit doors
- Shipping container access
- Mini warehouse storage (over 30sqm)



# NERANG

4 LAWRENCE DRIVE, NERANG QLD 4211

NUMBER OF UNITS

640

NLA

6,800sqm

OCCUPIED NLA %

84%

## FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Pin coded access 7 days
- Truck, caravan & boat storage (hardstand)
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolley available
- 24hr access
- Driveway access
- On site industrial bins
- Individually alarmed units
- Shipping container access
- Mini warehouse storage (over 30sqm)



# CARRARA

116 SPENCER ROAD, CARRARA QLD 4211

NUMBER OF UNITS

541

NLA

5,700sqm

OCCUPIED NLA %

50%

OPENED OCT 2016

## FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Self-managed records storage
- Undercover car storage
- Internal warehouse (multi-level)
- Humidity controlled storage
- Truck, caravan & boat storage (hardstand)
- 24hr access
- Driveway access
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Industrial bins available
- Individually alarmed unit doors
- Undercover loading docks/area



# ROBINA

177 SCOTTSDALE DRIVE, ROBINA QLD

NUMBER OF UNITS

952

NLA

10,200sqm

OCCUPIED NLA %

90%

## FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Self-managed records storage
- Truck, caravan & boat storage (hardstand)
- 24hr access available
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- On site industrial bins
- Individually alarmed unit doors
- Undercover loading docks/area





# ROBINA

243 SCOTTSDALE DRIVE, ROBINA QLD

## CONCEPT SUMMARY

To increase capacity and product diversity of existing facility to higher and better use

## SITE AREA

3,110 sqm

## CURRENT USE

Currently underutilised as hardstand

## PROPOSED USE

New 6 storey self storage facility with 150sqm office/retail space

## INDICATIVE YIELD

Circa 10,000sqm GFA – 600+ Units (approx.)

## TARGET CONSTRUCTION COMMENCEMENT

Mid 2019



CONCEPT IMAGE ONLY



# BUNDALL

106-110 BUNDALL ROAD, BUNDALL QLD

NUMBER OF UNITS

606

NLA

6,300sqm

RETAIL & OFFICE

230sqm

ANTICIPATED COMPLETION  
FEBRUARY 2019



# THANK YOU

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A photograph of a white building wall with vertical paneling. On the right side, there is a large yellow square sign with a black border. The sign contains the text "NATIONAL" in black and "STORAGE" in yellow, both in a bold, sans-serif font. To the left of the sign is a black door frame.

**NATIONAL  
STORAGE**

**WWW.NATIONALSTORAGE.COM.AU**  
**INVEST@NATIONALSTORAGE.COM.AU**