



Storage
Commander

New Tenant Onboarding Checklist

Improve Your Self-Storage Business Operations

Contents

Improving your onboarding process isn't just about solving one problem in your business – it's about creating procedures that make your company strong and resilient in a competitive market.

Onboarding is an important yet often overlooked step in the self-storage customer journey. First impressions count, and a clunky, disorganized process can send people packing. With a smooth and enjoyable onboarding process, however, you'll make customers feel confident in their decisions and happy with your services.

This checklist from the experts here at [Storage Commander](#) will explain exactly what you should cover before, during, and after the move-in phases. You'll also get a welcome packet template that you can easily fill out with your facility's details and hand to customers. Whether you operate a single location or [multiple facilities](#), this checklist will help you minimize confusion and support customers while increasing operational success.

Before Move-In

ONBOARDING

Lay the groundwork before a tenant moves in so they know exactly what to expect. With clear communication early on, you'll show customers that you're a responsible business, and they can trust you with their belongings. Use these steps to create a positive experience that sets the tone for a great experience before they even step foot in your facility.

- Provide a warm welcome packet:** Include facility rules, unit access instructions, payment details, and tips for an easy move-in. Make it simple and accessible so tenants feel confident and prepared.
- Verify identity:** Confirm the customer's identity using a government-issued ID. Keep the process simple.
- Obtain signed contracts:** Ensure the customer thoroughly reviews and signs the rental agreement. If they are signing in person, take time to explain the documents and answer any questions.
- Clearly explain payment terms and options:** Walk them through the billing process, from due dates to payment methods. Be transparent about possible fees (late payments, litter, damage, key replacement, etc.). Offer to help them set up auto-pay.
- Introduce support channels:** Explain how they can reach customer support – whether by phone, email, or chat – and reassure them that help is always available if they need it.

UNIT PREPARATION

Before handing over the keys to a storage unit, make sure there are no signs of previous renters or wear and tear. Clean, well-maintained units send the message that you care about keeping your customers' belongings safe as much as they do. Show that you run a secure facility by testing locks and access codes beforehand. No one wants to arrive at their unit only to find the lock is broken or their code doesn't work. All of these details contribute to an experience that leaves tenants feeling secure and valued.

- Clean and inspect thoroughly:** The unit should be spotless and in excellent condition before the tenant arrives.
- Test locks, doors, and security features:** Double-check that locks work smoothly, doors open and close properly, and all security features are fully operational.
- Provide access codes/keys:** Have these materials prepared and tested so tenants don't experience any delays when they first access their unit.
- Check lighting and environment:** Make sure the lighting near the unit is sufficient and common areas are well-maintained.

Move-In

FACILITY TOUR

Schedule a facility tour to give tenants a chance to familiarize themselves with the property layout, security features, and amenities. Ideally, the tour will take place a few days before or on their move-in date. If you show them around too far in advance, they might forget the layout and get confused when they're ready to start moving things in. Walking the facility with customers is a great personal touch that communicates your dedication to personalized service.

WALKING TOUR

- Show facility layout:** Walk the key areas of the facility while pointing out the location of their unit, entrances and exits, and any amenities – restrooms, loading docks, moving equipment, etc.
- Clarify facility rules:** Review important rules, such as access hours, prohibited items, and waste disposal guidelines.
- Explain how to access the facility:** Demonstrate how to enter and exit the facility using their key, card, or code.
- Demonstrate unit access & features:** Show how to safely unlock, open, close, and lock their unit. Point out any in-unit features, such as light bulbs and switches.

SAFETY AND SECURITY MEASURES

- Provide a detailed explanation of security systems:** Let tenants know about security cameras, motion sensors, or on-site personnel. Explain how these measures work to protect their belongings.
- Explain emergency procedures:** Go over any emergency contacts, evacuation routes, or other protocols to help tenants feel prepared in any situation.
- Offer insurance information:** Explain the benefits of obtaining coverage for stored items.

PROVIDE MOVE-IN ASSISTANCE

- Point out move-in resources:** Showcase items and services that help with the move-in process, such as carts, dollies, boxes, and lifting straps.
- Explain how to get on-the-spot help:** Have staff members available to assist with any issues that arise during move-in, from guiding the moving process to troubleshooting access problems.
- Provide clear moving routes:** Show tenants the most accessible routes for moving their belongings.
- Ensure easy access to loading areas:** Check parking and loading zones are clear, well-marked, and close to the units.

After Move-In

CUSTOMER SUPPORT AND FOLLOW-UP

Check in with tenants after they're all moved in to ensure you've met their needs and reinforce an open line of communication. Ask if there were any issues during the move-in process and if they have everything they need to store their belongings for the duration of their lease. By following up shortly after move-in day, you'll be able to resolve potential issues and show that you genuinely care about their experience.

- Send a thoughtful follow-up email or call:** Check in to see how the move went and if there are any lingering questions or issues.
- Address any concerns immediately:** Work quickly to resolve any issues that occurred during move-in.
- Remind tenants of available support:** Reinforce that your team is always there to help and reiterate communication channels.
- Offer additional resources and advice:** Provide useful guidance for optimizing storage space and using available amenities.
- Introduce referral programs:** Explain any programs or discounts available for referring new customers.
- Gather feedback:** Encourage customers to help you improve future service with honest feedback.

DOCUMENT AND RECORD-KEEPING

Proper documentation and record-keeping are essential. Maintain updated and accurate agreements, payment details, and communication logs for each tenant. Keep your system well-organized so you can easily pull information in case of disputes, legal issues, or customer inquiries. With good filing habits, you and your team will be able to manage accounts efficiently, increase transparency, and ultimately provide better customer service.

- Maintain customer files:** Record all relevant customer information, including signed agreements, contact details, and payment preferences.
- Log all support interactions:** Keep detailed records of any issues or requests so you can offer personalized service in future interactions.
- Update inventory records:** If applicable, record any [stored items](#) that customers want you to track.
- Regularly update tenant information:** Make it easy for tenants to update their contact information or preferences.

Welcome Packet

WELCOME TO

Dear

Welcome to _____! We are thrilled to have you as a new tenant and are committed to ensuring your storage experience is seamless and stress-free. Below, you will find all the essential information to get started:

UNIT DETAILS

Unit Number:
Access Code/Key:
Move-In Date:

PAYMENT INFORMATION

Monthly Rent:
Payment Due Date:
Accepted Payment Methods:

FACILITY RULES

Prohibited Items:
Waste Disposal:
Security Measures:

FACILITY MAP

Map Overview:
Please find attached a map of our facility, which highlights the location of your storage unit.
Unit Location:
[Describe the specific location of the unit within the facility, e.g., "Your unit is located in Building B, on the second floor, near the east elevator."]

INSURANCE INFORMATION

We strongly recommend that you insure your stored items. You can purchase storage insurance through us or consult your own insurance provider. For more details, please contact us at

CONTACT & SUPPORT

If you have any questions or need assistance, please do not hesitate to reach out to us via

Phone:
Email:
Website:

ADDITIONAL SERVICES

We offer a range of additional services, including packing supplies and truck rentals. Please let us know if you require any of these services.

Thank you for choosing _____.
We look forward to serving you!

Sincerely,

Key Areas: