

CEO Morning Briefing

Wednesday, 2026-03-18

Wednesday, March 18, 2026 | Carrera Crest Holdings

■ CEO TO DO

CEO TO DO

3/15/2025

TO DO:

Check on insurance for 92h

Create the TEN Salon lease proposal and send out

Create a draft of TEN Salon purchase agreement email to Erin

Email Melissa at Bello Haven for pricing info

Follow up on the payments sent to Reach Partners Owners as we need to resolve Julie Foliatt issue

Create a template and documentation for Carrera Crest Automation to be sold as a service

Fix 92H issues and get the monthly emails established

Go to DORA and update YCS license

Get DORA transfer paperwork for MM

Text MM about timing of transfer

Follow up on Boulevard access

Go To Chase about 2 new accounts

Deposit more cash

Cairn Property Tax updates and payments

Pay Parking ticket

Find wash basin pipe

Complete and send the Operating Agreements for Cairn Crest and Lugano Crest

■ FIRES

- **Lugano Crest LLC EIN — DO TODAY.** VelocitySBA commitment letter expires **April 10** (23 days). Lender cannot run due diligence without the EIN. Apply at [IRS.gov/ein](https://irs.gov/ein) — takes 15 minutes online. This is the single biggest blocker on the MM deal.
- **Life insurance application (\$1.1M)** — SBA closing condition; takes 2–4 weeks to issue. Start today or you risk missing the April 10 deadline.
- **Email processing broken** — Mail export hit a JSON parse error. No email summary today. Needs investigation.

■ ■ WARNINGS

- **Feb 2026 net loss (\$4,273)** — Payroll at 76% of revenue (target <65%). 2026 YTD revenue -31% vs budget.
- **Mar 2026 pacing at ~\$100K/mo** — improvement over Feb (\$93.9K) but still below 2025 avg (\$116K).
- **Teigan Maniatis rebook rate 47%** — critical gap; more than half her new clients don't return. Gating factor on graduation.
- **Breanna Harte on leave** — 54 scheduled March appointments going unserved. No firm return date.
- **Tashina Miranda critically low production** — \$355 total Feb, 36% utilization, \$17/hr Rev/Hr. Needs coaching plan or PIP decision.
- **Ali Guerrero hours unverifiable** — clock data inaccessible; can't confirm 20-hr/week mentorship presence.
- **14 SBA closing conditions outstanding** for MM deal.
- **Slack channel sync logging 12 errors** — monitor for archive gaps.

■ TODAY'S CALENDAR

| Time | Event | Duration | Location |
|----------|-----------------------------|----------|-------------|
| 10:30 AM | Elrock x Cairn Introduction | 30 min | Google Meet |
| 1:00 PM | Matthew Morris Amendment | 30 min | Google Meet |
| 2:00 PM | Matthew Morris X BLVD | 30 min | — |

No conflicts. 2.5-hour gap between morning and afternoon meetings.

Tomorrow (Thu 3/19):

- 8:00 AM–3:00 PM: Gustafson HVAC install
- 11:30 AM: Lunch w/ Peter Harnisch & Luke Kuckelman (Arx Advisors) @ Reivers Bar & Grill
- 9:30 PM: Pick up Luke Penelope

Rest of week:

- **Thu 3/19:** Salon Meeting 8:30 AM *(calendar shows 3/12 — likely recurring)*
- **Fri 3/20:** Eid al-Fitr (no meetings)
- **Sat 3/21:** Brooklyn events at salon 12:30–5PM; Wilson Groom 2:30 PM
- **Sun 3/22:** St. Baldrick's event 10:00 AM–2:00 PM

■ DASHBOARD STATUS

| Dashboard | Status | Last Updated | Schedule | Notes |
|-------------------|------------------|------------------|---------------------|---------------------|
| Payroll | ■ LIVE | 2026-03-18 08:05 | Daily + Mon rebuild | Current |
| Inventory | ■ LIVE | 2026-03-18 06:34 | Daily | Current |
| Web Station Index | ■ LIVE | 2026-03-18 08:06 | Daily | Current |
| Education | ■ Needs Creation | — | TBD | Generator not built |
| Associate Program | ■ Needs Creation | — | TBD | Generator not built |
| Marketing | ■ Needs Creation | — | TBD | Generator not built |

■ DEPARTMENT: INVENTORY

No inventory report today (runs Mondays). No COO scan data available.

Phorest data routed today (08:03): Staff Tips Daily, Staff Performance Detail Daily, Future Appointments 90 Days Daily — all deposited to incoming. Multiple backlogged copies from 3/17 also routed (22 files total — may indicate watcher caught up on missed routing).

■ DEPARTMENT: EDUCATION

Education Program Leader: Kaeleigh Tran

Major update (Mar 11): Kaeleigh posted the full 2026 education calendar to #education (@channel). Philip should review:

- **Apr 8:** Summit Tracking/Planning w/ Chelsea (2–4 PM) — Associates/L1 mandatory
- **Apr 13:** Curl Class w/ Lindsey Olson (10 AM–4 PM) — all-salon mandatory
- **May 6:** Shades EQ PK w/ Jenisa (2–4 PM)
- **Jun 3:** Kerastase Refresher — **MANDATORY FOR EVERYONE**
- **Jul 13:** Blonding Class w/ Sam Klaver (10 AM–4 PM) — all-salon mandatory (5 ♥■ reactions)
- Full schedule through December posted

Recent completions: Bello Haven Extension Class (Mar 2, 11 attended), Kerastase Refresher w/ Nicole (Feb 24), Exceptional Salon Service (Feb 16), Redken Shades ALK Mini Class (Feb 3).

Kerastase 2026 virtual education schedule shared — all sessions free, 90 min, QR registration.

Education Dashboard: Still in development — no generator built yet.

■ DEPARTMENT: ASSOCIATE PROGRAM

Associate Program Leader: Chelsea Badjar (Level 6 Stylist)

No APL briefing today (runs Mondays). Key status from Hiring Agent scan:

| Associate | Status | Key Metric |
|-----------------|----------------|--|
| Teigan Maniatis | ■ Behind | 47% rebook (target 60%+), \$34/hr Rev/Hr vs \$50 benchmark |
| Ali Guerrero | ■ Can't Assess | \$38 Feb revenue; measured on 20 hrs/wk presence — clock data inaccessible |
| 3rd Associate | ■ Unconfirmed | employees.csv inaccessible — identity unknown |

- **Alexis White** (graduated Nov 2025, now L1): Feb \$2,566 total, 101.6% utilization — performing well.
- **Chelsea's APL override window for Alexis closes ~March 22** — frees mentoring capacity.
- **Recruiting pipeline is empty.** Strategic direction: target experienced stylists with existing clientele.

■ DEPARTMENT: MANAGER 1:1

One-on-one data could not be loaded. Unable to report on recent COO or Manager meeting notes. **Flag: Investigate why 1:1 data loading failed.**

■ CUSTOMER FEEDBACK

No emails from contact@yachtclubsalon.com in the last 24 hours.

■ TAYLOR'S EMAILS

No emails from Taylor in the last 3 days. No briefing replies received.

■ TAYLOR'S BRIEFING REPLIES

No briefing replies from Taylor in the last 3 days. Feedback loop is quiet — consider checking in with Taylor on whether she's receiving and reviewing the weekly briefings.

■ EMAIL HIGHLIGHTS

Email export failed — JSON parse error at character 37,756. No email summary available today. Needs pipeline fix.

■ IMESSAGE

- [2026-03-18 07:11] +13037205995: "Lol thank you" — No business action needed.
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■ PHOREST DATA

22 Phorest reports routed at 08:03 today:

- **Staff Tips Daily** (Mar 18 + backlog from Mar 17)
- **Staff Performance Detail Daily** (Mar 18 + backlog from Mar 17)
- **Future Appointments 90 Days Daily** (Mar 18 + backlog from Mar 17)

All deposited to `data/incoming`. High volume suggests watcher caught up on previously unrouted files.

■ PAYROLL SNAPSHOT

No payroll report today (runs Mondays).

P&L; flags from Financial Snapshot:

- Feb 2026 payroll at **76% of revenue** — 11 pts above 65% target
 - Feb net loss of (\$4,273) — 4.6% loss vs revenue
 - 2026 YTD net: (\$18,422) across 3 months
 - Mar MTD: \$60,398 through day 18, pacing ~\$100K/mo
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■ PAYROLL CALENDAR

Pay Period 7 (2026-03-16 → 2026-03-29) — Day 3 of 14 | 7 working days remaining

Pending items from #yics-payroll-review (PP6):

- ■ **Megan King termination** (eff 03-07): 33.6 hrs PTO payout, -\$169.96 expense chargeback
 - Retail commission: Run prior month full retail payout
 - **Teagan support staff hours** (starting Mar 3, Tue/Wed): Separate at \$16.75/hr, do NOT factor into wage vs commission calc
 - **Erin Frost** worked Thu 3/12 — hours at \$16.75/hr support rate, not factored into wage vs commission
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■ TODAY'S ACTIONS

| Priority | Action | Source |
|----------|---|---------------|
| ■ | **Apply for Lugano Crest LLC EIN at IRS.gov/ein — TODAY** | Deal Pipeline |
| ■ | **Start life insurance application (\$1.1M)** — SBA closing condition | Deal Pipeline |
| ■ | **Read 4 TEN documents** (Legal Risk Assessment, MedSpa consultant, Lease Proposal, PFS) before any TEN decisions | Deal Pipeline |
| ■ | **Confirm 3rd Associate identity** — employees.csv inaccessible | Hiring |
| ■ | **Get Breanna Harte return date from Taylor** — 54 appointments going unserved | Hiring |
| ■ | **10:30 AM — Elrock x Cairn Introduction** (Google Meet) | Calendar |
| ■ | **1:00 PM — Matthew Morris Amendment** (Google Meet) | Calendar |

| Priority | Action | Source |
|----------|--|------------|
| ■ | **2:00 PM — Matthew Morris X BLVD** | Calendar |
| ■ | **Fix email export pipeline** — JSON parse error blocking all email summaries | Agent Logs |
| ■ | **Ali Guerrero hours audit** — pull clock_in_out.csv | Hiring |
| ■ | **Tashina Miranda trend review** — determine if PIP needed (by Mar 25) | Hiring |
| ■ | **Recruiting decision** — Chelsea's override window closes Mar 22; begin sourcing? | Hiring |
| ■ | **Investigate 1:1 data load failure** | 1:1 |
| ■ | **Review Kaeleigh's full 2026 education calendar** posted Mar 11 | Education |
| ■ | **Verify Teigan/Erin payroll splits** are correctly configured for PP7 | Payroll |

■ DAYTIME WATCHER

Yesterday (Mar 17): 8 actions across the day:

- Slack archive synced 6 times (08:03, 10:03, 12:04, 14:03, 16:04, 18:04)
- Slack Archive Dashboard rebuilt 3 times (08:06, 12:08, 14:07)

Today (Mar 18, so far):

- 08:03 — Slack channels refreshed
- 08:05 — Slack Archive Dashboard updated

Watcher operating normally. No anomalies detected.

■ AGENT STATUS

| Agent/Log | Errors | Warnings | Status |
|--------------------|--------|----------|------------------------------------|
| Briefing Compiler | 1 | 0 | ■■ |
| COO Daily | **3** | **1** | ■ No scan output produced |
| Mail Export | **1** | 3 | ■ JSON parse error — no emails |
| Slack Channel Sync | **12** | 0 | ■ Investigate |
| Slack Writeback | **4** | 0 | ■■ |
| Slack Post | **2** | 0 | ■■ |
| Runner Morning | **12** | 26 | ■■ High error/warning count |
| Delivery | 1 | 1 | ■■ |
| Phorest Router | 0 | 34 | ■■ High warnings (backlog routing) |
| Watcher | 0 | 16 | ■■ |
| All others | 0 | 0-2 | ■ |

Key system issues:

- **COO Agent produced no scan output** (3 errors) — FIRES and WARNINGS sections are incomplete today as a result

- **Email pipeline broken** — mail_export JSON error needs fix

- **Slack sync 12 errors** — likely related to the bot channel access issues flagged 3/16; verify bot re-invites completed

Generated 2026-03-18 ~08:10 | Briefing Compiler Agent (Opus)