

CEO Morning Briefing

Thursday, 2026-03-19

Thursday, March 19, 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 (FROM COO SCAN — ITEMS NEEDING IMMEDIATE ACTION TODAY)

- **PHOREST DATA PIPELINE STALLED — 6 days blind.** Last transaction file: Mar 15 (contains Mar 13 data). Last performance dashboard: Mar 12. No visibility on Mon/Tue/Wed revenue this week. Check `_Agent_Runner/logs/cron_phorest.log` immediately.

■ ■ WARNINGS (MONITOR THIS WEEK)

- **Megan King still in GLOBAL_CONFIG as Active** — Terminated 3/7. Remove from roster and bonus list. Confirm 33.6 hrs PTO payout and -\$169.96 chargeback processed.
- **Inventory shrinkage worsening: -\$1,468.92** — Was -\$1,158 in Feb. 3x over threshold. SKU-level reconciliation needed.
- **Tashina Miranda — no improvement.** \$354.80 MTD through Mar 12, identical to full Feb. 36% utilization (lowest), \$17.10/hr (lowest). 30-day decision point overdue.
- **Massive out-of-stock on high-velocity items** — Redken ABC line (Bandage Balm, 24/7 Serum, Conditioner, Shampoo, Leave-in) ALL at zero. Pureology Color Fanatic 21 Spray at zero (highest velocity 0.43/day). Multiple Kerastase at zero. Est. \$200+/week lost retail sales.
- **Deana Faust** — Rebook 64%, RTS 14%, both below target. Monitor.

■ TODAY'S CALENDAR

Time	Event	Location	Duration
8:00 AM – 3:00 PM	Gustafson HVAC Install	—	7 hrs
11:30 AM – 1:00 PM	**Lunch w/ Peter Harnisch & Luke Kuckelman (Arx Advisors)**	Reivers Bar & Grill, 1085 S Gaylord St	90 min
9:30 PM – 10:30 PM	Pick up Luke Penelope	—	60 min

■ ■ **Note:** Lunch meeting overlaps with HVAC install window — no conflict if HVAC doesn't need you on-site.

Tomorrow (Fri 3/20): Eid al-Fitr (holiday) — no meetings scheduled.

Rest of Week:

- **Sat 3/21:** Brooklyn (salon, 12:30–5p), Wilson Groom (2:30p, 1222 E 6th Ave) — ■ ■ overlap with Brooklyn
- **Sun 3/22:** St. Baldricks Event (10a–2p)
- **Wed 3/25:** Paychex Partnership Meeting (10:00–10:45a, WebEx)

■ DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	■ LIVE	2026-03-19 06:03	Daily + Mon rebuild	Current
Inventory Dashboard	■ LIVE	2026-03-18 08:16	Daily	22h old — acceptable
Web Station Index	■ LIVE	2026-03-18 16:06	Daily	Current
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator not built yet
Associate Program Dashboard	■ NEEDS CREATION	—	TBD	Generator not built yet

Dashboard	Status	Last Updated	Schedule	Notes
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator not built yet

■ DEPARTMENT: INVENTORY

- **CRITICAL: Massive out-of-stock across top brands.** Redken ABC entire line at zero with 0.10–0.37 units/day velocity. Pureology Color Fanatic at zero (0.43/day — highest velocity SKU). Multiple Kerastase at zero (Genesis, Resistance, Curl lines).
- **Shrinkage: -\$1,468.92** and worsening (was -\$1,158 Feb). Physical count needed on top 20 SKUs by value.
- **Jane Iredale winding down:** \$72.50 cost / 4 units remaining. 3 returns in data. Do not reorder slow movers.
- **Kerastase order form received yesterday** (Friends & Family Tiers 1 & 2) — detected by Daytime Watcher. Use this for emergency reorder.
- **No inventory report today** (runs Mondays). Full report ran Mon 3/16.

■ DEPARTMENT: EDUCATION

Education Program Leader: **Kaeleigh Tran**

■ **MAJOR UPDATE (Mar 11):** Kaeleigh posted the **complete 2026 education calendar** to #education (@channel). Philip should review:

Date	Class	Instructor	Audience
Apr 8, 2–4p	Summit Tracking/Planning	Chelsea	Associates/L1
Apr 13, 10–4p	Curl Class	Lindsey Olson	In-salon mandatory
May 6, 2–4p	Shades EQ PK	Jenisa	Associates/L1
Jun 3, 2–4p	**Kerastase Refresher**	—	**MANDATORY ALL STYLISTS**
Jul 8, 2–4p	Retail: Teach/Use/Sell	Jenisa	Associates/L1
Jul 13, 10–4p	**Blonding Class**	**Sam Klaver**	In-salon mandatory
Aug–Dec	Monthly classes continuing	Various	Associates/L1

- Kaeleigh also shared the full **Kerastase 2026 free virtual education schedule** (90-min sessions, registration via QR code).
- Recent completed: Bello Haven Extension Class (Mar 2, 11 attended), Kerastase Refresher w/ Nicole (Feb 24), Exceptional Salon Service (Feb 16).
- **Education Dashboard:** Still in development — needs creation.

■ DEPARTMENT: ASSOCIATE PROGRAM

Associate Program Leader: **Chelsea Badjar** (Level 6 Stylist)

- No APL briefing today (runs Mondays).

- Chelsea is performing well as stylist: \$8,119 MTD revenue (3rd highest in salon).
- Chelsea is scheduled to teach 3 monthly classes this year (Apr, Oct, Dec).
- Associate/Education Dashboard: needs creation.

■ DEPARTMENT: MANAGER 1:1

- One-on-one data could not be loaded this morning.
- **Action:** Investigate data source. Flag if 1:1s are overdue.

■ CUSTOMER FEEDBACK (OUTLOOK CONTACT@YACHTCLUBSALON.COM)

No customer emails in the last 24 hours.

■ TAYLOR'S EMAILS

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

■ EMAIL HIGHLIGHTS

121 emails (47 unread) across LuganoRidge (105) and Reach (16).

	Subject	Action
h Spa Connection)	***Closing timeline*** — asking for updated closing date, APA referenced 3/6	**RESPOND TODAY** — relates to TEN Salon on y
edale)	Back in stock products + pricing	Review — JI is winding down but may need final orde
	Sensor error: Back Door entry sensor not responding at 92H (5:15 AM)	Check if 92H back door sensor needs battery/replace
	Staff Tips Daily, Staff Performance Daily, Future Appointments 90 Days	Phorest reports ARE flowing via Looker — pipeline is
	Daily Inventory List + Gift Cards Redeemed (3/18)	Confirms Phorest is generating reports as of yesterda
	March compliance updates	Review at convenience

■ IMESSAGE

- **SimpliSafe (5:15 AM):** 92H back door entry sensor not responding — same alert as email. Check sensor.
- **+17209873127 (5:19 AM):** Personal message — Lagree class, DEI assignment. No action needed.
- **jstebner@icloud.com (10:47 PM yesterday):** "In in guild shit" — no action.

■ PHOREST DATA

24 reports routed today (6:03 AM): Staff Tips Daily, Staff Performance Detail Daily, Future Appointments 90 Days Daily — all routed to `data/incoming/`.

■■ **Key insight:** Phorest IS generating and emailing reports (Looker emails + Phorest daily emails arrived today for 3/18 data). The COO's "pipeline stalled" fire may be a **routing/processing issue**, not a Phorest outage. The daily CSVs aren't being extracted from these zip files into the data directory the COO agent reads.

■ PAYROLL SNAPSHOT

- No payroll report today (runs Mondays).
 - **Feb 2026 payroll: 76% of revenue** — above 75% threshold. Investigate hours/staffing mix.
 - **Pending PP6 items:** Megan King termination (33.6 hrs PTO payout, -\$169.96 chargeback), Teigan dual-rate split (\$16.75 support / normal associate rate), Erin Frost support hours 3/12 at \$16.75.
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■ PAYROLL CALENDAR

- **Current: Pay Period 7** (2026-03-16 → 2026-03-29)
 - Day 4 of 14 | 6 working days remaining
 - YCS Payroll Review has pending items to process at next payroll run
 - PP6 directives (Megan King term, Teigan/Erin rate splits) — confirm these were processed
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■ P&L; SNAPSHOT

Metric	Value	Flag
Feb 2026 Revenue	\$93,888	
Feb 2026 Net	(\$4,273)	■ Net loss
Feb 2026 Payroll %	76%	■■ Above 75%
2026 YTD Revenue	\$264,762	■ -31% vs budget
Mar 2026 MTD	\$60,398	Pacing ~\$95K/mo

Top performers MTD: Erin Frost (\$10,870 — 29% RTS, \$150/hr, 108% util), Kathryn Meese (\$10,034), Chelsea Badjar (\$8,119).

■ TODAY'S ACTIONS

- [] ■ **URGENT: Investigate Phorest pipeline** — Reports ARE arriving via email/Looker but CSVs not landing in COO data directory. Check routing/extraction, not Phorest itself.
- [] ■ **RESPOND: Melissa Eppinger** — Closing timeline for TEN Salon. APA deadline was 3/6. She's waiting.
- [] ■ **Emergency inventory reorder** — Redken ABC + Pureology Color Fanatic at zero. Use Kerastase Friends & Family order form received yesterday. Alert Taylor.

- [] ■■ Update GLOBAL_CONFIG — Remove Megan King from roster and bonus list.
- [] ■■ Tashina Miranda decision — 30-day window closing. Data shows no improvement.
- [] ■■ Shrinkage investigation — \$1,468.92 and rising. Schedule physical count with Taylor.
- [] ■■ Check 92H back door sensor — SimpliSafe alert at 5:15 AM (email + iMessage).
- [] ■ Review Kaeleigh's 2026 education calendar — Full year posted Mar 11. Jun 3 Kerastase mandatory for ALL stylists.
- [] ■ Confirm PP6 payroll items processed — Megan King term, Teigan/Erin rate splits.
- [] ■ Review Jane Iredale back-in-stock email — Inventory winding down, decide on final order.

■ DAYTIME WATCHER (YESTERDAY, MAR 18)

- Slack archive synced 6x (8am, 10am, 12pm, 2pm, 4pm, 6pm) — all successful with dashboard updates.
- New data file detected (10:00 AM): Kerastase Friends & Family Tiers 1 & 2 Order Form — available for emergency reorder.
- No other intra-day anomalies detected.

■ AGENT STATUS

Agent	Status	Notes
Morning Pipeline	■	All phases completed
COO Daily Scan	■	Ran but couldn't write to target (permissions) — output captured
Briefing Compiler	■	0 errors
Calendar Export	■	0 errors
Mail Export	■	0 errors
Outlook Export	■	0 errors
iMessage Export	■	0 errors
Phorest Router	■■	0 errors, **13 warnings** — likely duplicate file routing
Slack Channel Sync	■	**8 errors** — bot still kicked from some channels?
Slack Sync	■	0 errors
Vendor Learning	■	0 errors
Zoom Router	■	0 errors

■■ Slack Channel Sync has 8 errors — likely related to the bot being kicked from channels (identified 3/16). Verify bot has been re-invited to all 13 channels.

Compiled: 2026-03-19 06:03 | Data currency: Mar 12–13 (COO), Mar 18 (Phorest routing), Mar 19 (email/calendar/iMessage)