

CEO Morning Briefing

Friday, 2026-03-20

Friday, March 20, 2026 | Carrera Crest Holdings

■ CEO 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
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■ FIRES

1. Phorest Data Pipeline — 12 Days Blind (since Mar 8)

Most recent performance snapshots dated 2026-03-08. ~60% of March unmeasured. Cannot track revenue, utilization, or staff performance. **This is the #1 blocker.** Note: Phorest daily report *emails* are arriving (inventory, clock in/out, utilization, sales, tips) — the issue is the processing/routing pipeline, not Phorest itself.

2. GLOBAL_CONFIG Stale — Megan King Still Listed as Active

Terminated 3/7 per Philip's 3/11 correction. Still in GLOBAL_CONFIG.md as active support staff (line 20) and bonus eligible (line 461). Outstanding 33.6 hrs PTO payout on next payroll.

■ ■ WARNINGS

- **Inventory Shrinkage: -\$1,468.92** — up from -\$1,158 in Feb, nearly 3x the -\$500 threshold. Second consecutive month.
 - **Alicia King Booth Rent** — No March payment. Approaching 30+ days since last entry.
 - **Breanna Harte Return Unknown** — Family emergency leave, 54 appointments (\$3,882) on her book. Should be near return date. Clients may need rebooking.
 - **Deana Faust Underperformance** — Rev/Hr \$44.07 (lowest in salon), utilization 55.2%, WoW -41%.
 - **Redken ABC + Color Fanatic Out of Stock** — Highest-velocity items at zero. Direct daily revenue loss.
 - **Jane Iredale Capital Concentration** — 28+ SKUs in low inventory, 28.5% of inventory value, only 21% sell-through.
 - **Alcohol Bar Depleted** — Mimosa (0.80/day velocity), Raspberry Blonde, Prosecco all zero.
 - **Feb Net Loss (\$4,273)** — Payroll at 76% of revenue (target <65%). 2026 YTD revenue -31% vs budget.
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■ TODAY'S CALENDAR

No events scheduled for today (Friday, March 20).

Tomorrow — Saturday, March 21

- 12:30–5:00 PM: **Brooklyn** (salon calendar)
- 2:30–3:30 PM: **Wilson Groom** @ 1222 E 6th Ave, Denver CO 80218

Rest of Week

- **Sun 3/22:** St. Baldrick's Event, 10:00 AM–2:00 PM (salon participation confirmed — Taylor + 3 stylists volunteering)
 - **Wed 3/25:** Lugano Ridge / Paychex Partnership Meeting, 10:00–10:45 AM (WebEx)
 - **Fri 3/27:** Luke Italy Trip (all day, family)
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■ DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll	■ LIVE	2026-03-20 06:02	Daily + Mon full rebuild	Current
Inventory	■ LIVE	2026-03-19 06:15	Daily	24h old — refresh today
Web Station Index	■ LIVE	2026-03-19 16:06	Daily	Current
Education	■ Not created	—	TBD	Generator needed
Associate Program	■ Not created	—	TBD	Generator needed

Dashboard	Status	Last Updated	Schedule	Notes
Marketing	■ Not created	—	TBD	Generator needed

DEPARTMENT: INVENTORY

- **Redken ABC line completely out of stock** — Hair Bandage Balm (0.37/day), Shampoo Sm (0.23/day), 24/7 Serum (0.20/day), Conditioner (0.20/day). Fastest sellers, zero units.
- **Pureology Color Fanatic 21 Spray** — 0 units, **0.43/day velocity** (fastest mover in entire salon). Empty.
- **Shrinkage worsening**: -\$1,468.92 in March vs -\$1,158 Feb. Needs investigation.
- **Jane Iredale**: 28+ SKUs low inventory, tying up 28.5% of inventory capital with only 21% sell-through. Consider markdown/discontinue strategy.
- **Alcohol bar**: Mimosa Weekday (0.80/day), Mimosa Weekend, Raspberry Blonde, Prosecco — all zero. Restock urgently for weekend traffic.
- Full inventory report runs Monday. No report available today.

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

Recent completions: Bello Haven Extension Class (Mar 2, 11 stylists), Kerastase Refresher w/ Nicole (Feb 24), Exceptional Salon Service (Feb 16).

Education Dashboard: In development — no generator built yet.

DEPARTMENT: ASSOCIATE PROGRAM

Associate Program Leader: Chelsea Badjar (Level 6 Stylist)

No APL briefing today (runs Mondays). Key associate metrics from COO scan:

- **Teigan Maniatis** — Jan \$357 → Feb \$1,129 (+216%), Mar Wk1 \$734, 29 future appts. On track for Apr-May breakeven. ■
- **Tashina Miranda** — Jan \$668 → Feb \$355 (-47%). Philip noted "seems improving." 12 March appts (\$718). Cannot verify without fresh Phorest data.
- **Ali Guerrero** — 8 March appts (\$599). Measure by 20+ hrs/week in-salon presence, not revenue (per Philip).

Associate Program Dashboard: Not yet created.

DEPARTMENT: MANAGER 1:1

One-on-One data could not be loaded. Flag: **1:1 data source may be stale or disconnected**. Verify 1:1 notes pipeline is working.

■ CUSTOMER FEEDBACK

No emails from contact@yachtclubsalon.com in the last 24 hours. No complaints or bridal requests pending.

■ TAYLOR'S EMAILS (3 THREADS, LAST 3 DAYS — RESPOND TODAY)

- **Mother's Day Gift Guide (Mar 19, 12:31 PM)** ■ SAME-DAY

Taylor needs the password document restored to her Dropbox — specifically Level Loyalty and RedkenPro account logins so she can pull imagery for the Mother's Day magazine feature. She's also asking: did your friend create the marketing, or are you using what you texted? She's waiting on direction re: "buddy discount for party" concept.

- **St. Baldrick's 2026 (Mar 19, 12:24 PM)**

Taylor confirmed: 3 stylist volunteers for shaves, she and Philip will be there to coordinate. Event is **this Sunday 3/22**. No action needed unless logistics change.

- **Mother's Day Gift Guide follow-up (Mar 19, 9:50 AM)**

Same thread — Taylor checking if marketing creative is ready and whether it's Mother's Day focused as discussed.

Priority: Respond to Taylor re: Dropbox password doc + Mother's Day marketing direction today.

TAYLOR'S BRIEFING REPLIES

No briefing replies from Taylor in the last 3 days.

✉ ■ EMAIL HIGHLIGHTS

- **Kerastase Invoice #6043238606** — Review/file. Package tracking links included.
 - **Mergix Accounting Payment Receipt** — \$1,287.50 paid to Mergix for Lugano Ridge LLC (charged to card ending 2482).
 - **Phorest daily reports arriving** (5 reports: Inventory List, Staff Clock In/Out, Staff Utilization, Sales Transactions, Gift Cards) — data is being emailed but pipeline processing is broken.
 - **Salon Centric: 20% OFF L'Oréal Professionnel** — Today only. Consider if restocking needs align.
 - **Salon Centric: Pulp Riot Satire** — New product launch notification.
 - **Looker reports** (3): Staff Tips Daily, Staff Performance Daily, Future Appointments 90 Days — auto-scheduled from Phorest.
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■ IMESSAGE

- **Beautista (Mar 19)**: New applicant for Associate position. Check at beautista.com. → Forward to hiring pipeline.
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PHOREST DATA

25 reports routed to `data/incoming` at 06:02 today. Reports include: Staff Tips Daily, Staff Performance Detail Daily, Future Appointments 90 Days Daily. Multiple backlogged copies from 3/19 watcher cycles also routed.

Note: 15 warnings in phorest_router.log — likely duplicate file handling. The raw data is arriving; the *processing* pipeline that turns these into usable snapshots is the broken piece.

■ PAYROLL SNAPSHOT

- No full payroll report today (runs Mondays).
 - **Feb 2026 Payroll: 76% of revenue** — above 75% threshold, well above 65% target. Investigate staffing mix.
 - **Feb 2026 Net Loss: (\$4,273)** — salon ran at -4.6%.
 - **2026 YTD Revenue: \$264,762** — 31% below budget.
 - **Mar MTD: \$60,398** — pacing ~\$90,597/mo annualized (below 2025 avg of \$116K).
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■ PAYROLL CALENDAR

Pay Period 7 (2026-03-16 → 2026-03-29) — Day 5 of 14 | 5 working days remain

Pending items from `#yca-payroll-review` for next run:

- **TERMINATION**: Megan King (effective 3/7, PP6) — 33.6 hrs PTO payout, -\$169.96 expense chargeback
- **BONUS**: Teigan — separate support staff hours (Tue/Wed) at \$16.75/hr, exclude from wage vs commission
- **BONUS**: Erin Frost — Thu 3/12 hours at \$16.75/hr support staff rate
- **Retail Commission**: Run prior month full retail payout

■ TODAY'S ACTIONS

- [] ■ **Fix Phorest data pipeline** — Reports are arriving by email but not being processed. 12 days blind. #1 priority.
 - [] ■ **Update GLOBAL_CONFIG.md** — Remove Megan King from roster (line 20) and bonus list (line 461).
 - [] **Respond to Taylor** — Dropbox password doc + Mother's Day marketing direction (same-day).
 - [] **Reorder Redken ABC line + Pureology Color Fanatic** — Zero stock on highest-velocity items.
 - [] **Restock alcohol bar** — Mimosas, Raspberry Blonde, Prosecco all empty before weekend.
 - [] **Confirm Breanna Harte return status** — 54 appointments need serving or rebooking.
 - [] **Collect Alicia King booth rent** — Past 30-day window.
 - [] **Check Beautista applicant** — New associate applicant via iMessage notification.
 - [] **Review Kaeleigh's 2026 education calendar** — Full schedule posted Mar 11, confirm alignment.
 - [] **Prep for St. Baldrick's (Sunday)** — Taylor confirmed 3 volunteers + Philip attending.
 - [] **Review Salon Centric 20% L'Oréal deal** — Today only, may align with restock needs.
 - [] **Investigate phorest_router warnings** — 15 warnings in today's log (likely duplicate files).
 - [] **Cancel/reassign Erin T Treinen appointment** — 1 future appt (\$193), on exclusion list.
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■ DAYTIME WATCHER (YESTERDAY, MAR 19)

Active throughout the day — 6 Slack sync cycles (8 AM, 10 AM, 12 PM, 2 PM, 4 PM, 6 PM). Slack Archive Dashboard rebuilt 4 times following detected channel changes. No file ingest or Phorest routing actions during daytime. **Watcher operating normally — Slack sync healthy.**

■ AGENT STATUS

Agent	Status	Notes
Morning Pipeline	■	All phases completed, 0 errors
COO Daily Scan	■	Ran successfully
Briefing Compiler	■	Running now
Calendar Export	■	7 events loaded
Mail Export	■	87 emails (44 unread)
Outlook Export	■	Ran, 0 customer emails
iMessage Export	■	2 messages captured
Slack Sync	■	Channels synced
Phorest Router	■■	25 reports routed, **15 warnings**
Vendor Learning	■	No errors
Zoom Router	■	No errors

Agent	Status	Notes
Daytime Watcher	■	6 cycles yesterday, all healthy

Overall: 13/14 agents green. Phorest router warnings need review.