

CEO Morning Briefing

Saturday, 2026-03-21

Saturday, March 21, 2026 | Carrera Crest Holdings

■ CEO TO DO

Check on insurance for 92h — PENDING

Create the TEN Salon lease proposal and send out — DONE

Create a draft of TEN Salon purchase agreement email to Erin — PENDING

Email Melissa at Bello Haven for pricing info — DONE

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

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

Fix 92H issues and get the monthly emails established — PENDING

Go to DORA and update YCS license — PENDING

Get DORA transfer paperwork for MM — PENDING

Text MM about timing of transfer — DONE

Follow up on Boulevard access — DONE

Go To Chase about 2 new accounts — DONE

Deposit more cash — DONE

Cairn Property Tax updates and payments — PENDING

Pay Parking ticket — DONE

Find wash basin pipe — PENDING

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

7 items remaining (PENDING) | 10 items completed (DONE)

■ FIRES (IMMEDIATE ATTENTION)

- **March Performance Data Is Stale** — The 03-2026 `staff_performance.csv` is identical to February (same \$93,888 to the penny). We're 21 days into March with no usable data. **Action: Re-export March MTD Performance Detail from Phorest today.**

- **Megan King Still in GLOBAL_CONFIG** — Terminated 3/7, still listed as active Support Staff and bonus-eligible. Must be cleaned up before Monday payroll run.
- **Mask Promo Product at Zero Stock** — Chronologiste Masque Intense Regenerant has 0 units. This is a featured product in the March \$10 Mask Treatment Promo. **Cannot run a promo on a product you don't have.**

■ ■ WARNINGS (MONITOR THIS WEEK)

- **Inventory shrinkage: -\$1,158** (threshold -\$500) — needs SKU reconciliation
- **80+ SKUs at zero stock** (snapshot is 26 days old from 2/23 — stale)
- **Tashina Miranda** — Jan \$668 → Feb \$355 (-47%). Decision window ~4/10. Need March data to assess.
- **Deana Faust** — 64% rebook (lowest), \$66/hr rev. Philip wants 13-week util average.
- **Teigan Maniatis** — 67.68% util (below 70% threshold), but revenue up 216% Jan→Feb.
- **Breanna Harte** — On family emergency leave, 54 March appointments booked. Monitor return.
- **Salon utilization: 62.5%** vs 90% bonus threshold — structural gap.
- **Feb Net Loss: (\$4,273)** — Payroll at 76% of revenue (target <65%).
- **2026 YTD revenue -31% vs budget** — \$264,762 YTD, significant shortfall.

■ TODAY'S CALENDAR — SATURDAY, MARCH 21

Time	Event	Duration	Notes
12:30 – 5:00 PM	Brooklyn	4.5 hrs	Salon calendar (duplicate entry)
2:30 – 3:30 PM	Wilson Groom	1 hr	1222 E 6th Ave, Denver CO 80218

■ ■ **Conflict:** Wilson Groom overlaps with Brooklyn (2:30–3:30 falls within 12:30–5:00).

Tomorrow (Sunday 3/22): St. Baldricks Event — 10:00 AM–2:00 PM (salon) + 10:30 AM–12:30 PM overlap

Mon 3/23: Mya tour & training (Zoom, 1–2 PM) · Pick up Luke (3–4 PM)

Wed 3/25: Paychex Partnership Meeting (Webex, 10:00–10:45 AM)

Fri 3/27: Luke Italy Trip begins (all day)

■ DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll	■ LIVE	2026-03-21 06:02	Daily + Mon rebuild	Current
Inventory	■ LIVE	2026-03-20 06:15	Daily	24h old — acceptable
Web Station Index	■ LIVE	2026-03-20 18:05	Daily	Current
Education	■ NEEDS CREATION	—	TBD	Generator not built yet
Associate Program	■ NEEDS CREATION	—	TBD	Generator not built yet

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

■ DEPARTMENT: INVENTORY

- **Data is 26 days stale** (last snapshot 2/23) — fresh Phorest export urgently needed
- **Chronologiste Masque: 0 units** — featured promo product, must reorder or pull from promo
- **80+ SKUs at zero** including core lines: Pureology Hydrate S&C;, Redken ABC (both sizes), multiple Kerastase items, 4 of 5 alcohol items
- **Shrinkage: -\$1,158** (exceeds -\$500 threshold) — reconciliation needed when fresh data arrives
- **Inventory value: \$30,451** (Retail \$24,791 + Professional \$5,661)
- Full inventory report runs Monday. No report today.

■ DEPARTMENT: EDUCATION

Leader: Kaeleigh Tran (Education Program Leader)

Kaeleigh posted a **major update on Mar 11** — the complete 2026 Education Calendar:

Upcoming classes:

- **Apr 8, 2–4 PM:** Summit Tracking/Planning for Success w/ Chelsea (associates/L1)
- **Apr 13, 10 AM–4 PM:** Curl Class w/ Lindsey Olson (mandatory in-salon)
- **May 6, 2–4 PM:** Shades EQ PK w/ Jenisa
- **Jun 3, 2–4 PM:** Kerastase Product Knowledge Refresher — **MANDATORY FOR EVERYONE**
- **Jul 13, 10 AM–4 PM:** Blonding Class w/ Sam Klaver (5 ♥■ reactions)

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

Kaeleigh also shared the Kerastase 2026 free virtual education schedule (90-min sessions, registration via QR code).

■ **Education Dashboard: Not yet built** — data sources identified (Slack, email, Phorest, CEU tracking).

■ DEPARTMENT: ASSOCIATE PROGRAM

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

- No APL briefing today (runs Mondays)
- Active associates: Alexis White, Ali Guerrero, Teigan Maniatis
- Teigan trending up: \$357 → \$1,129 (+216%) but below 70% utilization
- Associate Program Dashboard: Not yet built
- PP6 payroll note: Teigan's support staff hours (Tue/Wed) need separate tracking at \$16.75/hr

■ DEPARTMENT: MANAGER 1:1

- **1:1 data could not be loaded** for this briefing cycle
- Unable to determine last COO or Manager meeting dates
- ■■ Flag: Verify 1:1 data source and schedule. If overdue, consider scheduling.

■ CUSTOMER FEEDBACK (OUTLOOK CONTACT@YACHTCLUBSALON.COM)

No customer emails in the last 24 hours. No complaints, bridal requests, or review responses pending.

■ TAYLOR'S EMAILS (LAST 3 DAYS — 6 UNIQUE THREADS)

- ■ **Mother's Day Gift Guide promo** (Mar 19–20, multiple exchanges) — Taylor created Canva designs (portrait + landscape) for Mother's Day specials. She couldn't access brand content due to missing Dropbox passwords. Says branding/marketing files now visible but **still no password Excel sheet**. Vendor imagery (Level Loyalty, RedkenPro) needs login access. Taylor completed her reply to the publication Friday night — specials valid all of May. **ACTION NEEDED: Ensure Taylor has the password file in Dropbox.**
- **New Hire: Nicole** (Mar 20, 8:11 AM) — Taylor sent welcome email to new support staff member Nicole, CC'd Philip for Phorest and Paychex onboarding. **ACTION NEEDED: Get Nicole set up in Phorest and Paychex.**

■ EMAIL HIGHLIGHTS

- **Jim Bickford (LawHedge)** — "Devin - Closing - Side Agreement" — financing terms proposal: 2yr standby, 3yr I/O, then fully amortized over 10. **Needs review and response.**
- **Looker reports arrived:** Future Appointments 90 Days, Staff Tips, Staff Performance Detail (daily auto-reports)
- **Phorest daily reports:** Staff Utilisation, Inventory List, Clock In-Out, Sales Transactions (3/20)
- **Kerastase invoice:** #6043238606 detected

■ IMESSAGE

- [2026-03-21 05:34] +17204295526: "I'm going to be late this morning I haven't felt good all night"
- ■■ **Saturday staff calling in late/sick.** Identify who this number belongs to and confirm salon coverage.

■ PHOREST DATA

25 reports routed to `data/incoming` at 06:01 AM:

- Staff Tips Daily (3/21 + 3/20 backfill)
- Staff Performance Detail Daily (3/21 + 3/20 backfill)
- Future Appointments 90 Days Daily (3/21 + 3/20 backfill)

All routed in DATED mode. Multiple historical copies from 3/20 watcher cycles also ingested.

■ PAYROLL SNAPSHOT

No payroll report today (runs Mondays). Key standing items:

- **Feb payroll: 76% of revenue** — above 75% alert threshold, well above 65% target
 - **Feb net loss: (\$4,273)** — 4.6% loss ratio
 - **March pacing:** \$60,398 MTD → ~\$86,283 annualized (below Feb's \$93,888)
 - **Megan King termination (3/7):** 33.6 hrs PTO payout + \$169.96 expense chargeback — **still not cleaned from GLOBAL_CONFIG**
 - **Teigan:** Support staff hours (Tue/Wed) at \$16.75/hr need separate tracking
 - **Erin Frost:** Worked Thu 3/12 at \$16.75/hr support rate — exclude from wage vs commission
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■ PAYROLL CALENDAR

Pay Period 7 (2026-03-16 → 2026-03-29) — Day 6 of 14

5 working days remaining | March 2026, period 3 of 3

■ YCS Payroll Review has pending items from PP6 that will carry into next payroll run.

■ TODAY'S ACTIONS

- [] **Identify the 5:34 AM iMessage sender** — someone calling in late/sick on a Saturday. Confirm salon coverage.
- [] **Re-export March MTD Performance Detail from Phorest** — #1 data blocker
- [] **Re-export current inventory snapshot from Phorest** — 26 days stale
- [] **Check Chronologiste Masque stock** — promo product at zero, verify or reorder
- [] **Remove Megan King from GLOBAL_CONFIG** — still active, terminated 3/7, must fix before Monday payroll
- [] **Send Taylor the Dropbox password file** — she's blocked on Mother's Day promo vendor imagery
- [] **Set up Nicole in Phorest and Paychex** — new support staff hire, Taylor sent welcome email
- [] **Review Jim Bickford's side agreement** — financing terms need response (2yr standby / 3yr I/O / 10yr amortization)
- [] **Draft TEN Salon purchase agreement email to Erin** (CEO TO DO — pending)
- [] **Check 92H insurance** (CEO TO DO — pending)

- [] **DORA: Update YCS license + MM transfer paperwork** (CEO TO DO — pending)
- [] **Cairn Property Tax updates and payments** (CEO TO DO — pending)
- [] **Find wash basin pipe** (CEO TO DO — pending)
- [] **Fix _Agent_Runner permissions** — COO agent couldn't write output to disk

■ ■ DAYTIME WATCHER (YESTERDAY, 3/20)

Watcher ran 6 cycles (8 AM – 6 PM, every 2 hours). Activity:

- **Slack:** Channel changes detected and synced at each cycle (6 syncs)
- **Dashboards:** Slack Archive Dashboard rebuilt 6 times following syncs
- **No file routing or Phorest intra-day actions** detected outside scheduled runs

Watcher functioning normally — Slack archive staying current.

■ AGENT STATUS

Agent	Status	Notes
Morning Pipeline	■ Ran	0 errors across all phases
COO Daily Scan	■ Ran	Output blocked by permissions (data delivered inline)
Briefing Compiler	■ Running	This briefing
Calendar Export	■ Ran	9 events loaded
Mail Export	■ Ran	83 emails processed
Outlook Export	■ Ran	No customer emails found
iMessage Export	■ Ran	1 message captured
Slack Sync	■ Ran	All channels synced
Phorest Router	■ ■ 15 warnings	25 reports routed — warnings likely duplicate file handling
Daytime Watcher	■ Active	18 actions yesterday
Vendor Learning	■ Ran	No errors

■ ■ **Permission issue:** COO agent and output writes blocked. Fix `_Agent_Runner/outputs/permissions`.

Compiled 2026-03-21 06:02 AM | Next briefing: Monday 2026-03-23 06:00 AM