

CEO Morning Briefing

Sunday, 2026-03-22

Sunday, March 22, 2026 | Carrera Crest Holdings

TODAY'S ACTIONS

■ Urgent (Today)

- Investigate 7-day Phorest data gap (Mar 16-21) — pipeline may be broken, blocking all downstream analytics (COO scan)
- Review & respond to Taylor's Mother's Day promo emails — she's waiting on Dropbox passwords/branding files and sent final designs Friday (Taylor emails)
- Review Taylor's new hire onboarding email for Nicole — connect on Phorest/Paychex setup (Taylor email 3/20)

■ This Week

- Update GLOBAL_CONFIG.md — remove Megan King from active roster (flagged 3/11, 11 days overdue) (COO scan)
- Collect Alicia King's March booth rent — \$0 recorded, approaching 30 days (COO scan)
- Verify Tashina Miranda's March status — \$0 revenue through 3/12, scheduled or on leave? (COO scan)
- Fix March performance dashboard — still contains February data (COO scan)
- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 15+ days since last (1:1 data)
- Review Kaeleigh's 1:1 coaching notes from 3/19 — Ali and associate updates (Kaeleigh email)
- Paychex Partnership Meeting prep — Wednesday 3/25 at 10 AM (calendar)
- Mya tour & training session — tomorrow 1 PM via Zoom (calendar)
- Check on insurance for 92H (CEO TO DO)
- Draft TEN Salon purchase agreement email to Erin (CEO TO DO)
- Go to DORA — update YCS license + get MM transfer paperwork (CEO TO DO)
- Cairn Property Tax updates and payments (CEO TO DO)
- Fix 92H issues and establish monthly emails (CEO TO DO)
- Find wash basin pipe (CEO TO DO)

■ Queued

- Confirm Ali Guerrero's weekly hours — measure by 20+ hrs/week presence per correction (COO scan)
- Create Education Dashboard (needs generator & schedule)
- Create Associate Program Dashboard (needs generator & schedule)

[] Create Marketing Dashboard (needs generator & schedule)

[] Resolve Julie Follett fee structure for Reach Properties (CEO TO DO — marked DONE but structure still TBD)

■ 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 Follett 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 PENDING | 10 DONE

■ FIRES

1. 7-Day Phorest Data Gap (Mar 16–21)

Most recent daily Phorest data files are dated **March 15**. Full business week missing — no sales, no performance snapshots, no tips. Pipeline is flying blind.

- **Likely cause:** Phorest email delivery stopped, or `phorest_router.sh` failed silently
- **Note:** Today's router run (3/22) successfully routed 37 files including Sales Transactions, Inventory, Clock In/Out, Tips, Utilisation, Gift Cards — so the router IS working now. The gap is Mar 16–21.
- **Silent Failure Rule concern:** This gap should have triggered a HIGH pipeline alert days ago. If it didn't, the staleness detection may not cover multi-day gaps in daily files.

2. Megan King Still in GLOBAL_CONFIG as Active

Terminated 3/7. Flagged by Philip on 3/11 — **11 days ago, still not corrected.** Risk of incorrect payroll/bonus calculations.

■ ■ WARNINGS

- **March dashboard shows February data** — Staff performance figures are identical to Feb. Monthly dashboard was never refreshed.
 - **Tashina Miranda** — **\$0 revenue through 3/12.** Was supposed to be improving. Need schedule verification.
 - **Deana Faust** — **persistent underperformance.** March: \$639 rev, 55% util, \$44/hr (all lowest). 13-week rolling average queued.
 - **Alicia King booth rent** — **\$0 March.** Approaching 30 days since last payment.
 - **Breanna Harte** — **on family emergency leave.** Expected, not a performance flag. Monitor for return.
 - **Feb 2026 P&L;: Net loss (\$4,273), payroll at 76% of revenue** (target <65%). 2026 YTD revenue -31% vs budget.
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TODAY'S CALENDAR

Today — Sunday, March 22

Time	Event	Duration
10:00 AM – 2:00 PM	**St Baldricks**	4 hrs
10:30 AM – 12:30 PM	**St. Baldricks Event!** (YCS calendar)	2 hrs

■ ■ Overlap: Two St. Baldricks entries (likely same event, dual-calendared). Salon open 8am–5pm, lighter Sunday traffic.

Tomorrow — Monday, March 23

- 1:00 PM: Mya tour & training session (Zoom, 1 hr)
- 3:00 PM: Pick up Luke from school (1 hr)

Rest of Week

- **Wed 3/25:** Lugano Ridge / Paychex Partnership Meeting, 10:00–10:45 AM (WebEx)
 - **Thu 3/26:** No events
 - **Fri 3/27:** Luke Italy Trip begins (all day)
 - **Sun 3/29:** Palm Sunday
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DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	■ LIVE	2026-03-22 06:02	Daily + Mon rebuild	Current

Dashboard	Status	Last Updated	Schedule	Notes
Inventory Dashboard	■ LIVE	2026-03-21 06:16	Daily	24h ago — normal for Sunday
Web Station Index	■ LIVE	2026-03-21 13:48	Daily	Current
Education Dashboard	■ NEEDS CREATION	—	TBD	No generator built yet
Associate Program Dashboard	■ NEEDS CREATION	—	TBD	No generator built yet
Marketing Dashboard	■ NEEDS CREATION	—	TBD	No generator built yet

DEPARTMENT: INVENTORY

No inventory report today (runs Mondays). Key data from COO scan:

- **Inventory On Hand:** Last snapshot 2026-03-15 (XLS). 7 days stale due to data gap.
- **Inventory CSV:** 1,647 rows as of 3/1. Monthly export.
- **Jane Iredale:** Stacy/Philip agreed to reduce the line by clearing slow-movers (from 1:1 notes 3/20–3/22).
- Today's router successfully pulled Inventory_List (PDF + XLS) — data should refresh once ingested.
- Full inventory analysis queued for Monday's Inventory Agent run.

DEPARTMENT: EDUCATION

Education Program Leader: Kaeleigh Tran

Major Update — Full 2026 Class Calendar Posted (Mar 11)

Kaeleigh posted the master education schedule to #education. Key upcoming dates:

Date	Class	Instructor	Mandatory
Apr 8, 2–4pm	Summit Tracking/Planning	Chelsea	Associates/L1
Apr 13, 10–4pm	Curl Class	Lindsey Olson	In-salon
May 6, 2–4pm	Shades EQ PK	Jenisa	Associates/L1
Jun 3, 2–4pm	Kerastase Refresher	—	**ALL STYLISTS**
Jul 8, 2–4pm	Retail: Teach, Use, Sell	Jenisa	Associates/L1
Jul 13, 10–4pm	Blonding Class	Sam Klaver	In-salon

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

Kerastase 2026 Virtual Education schedule shared — all sessions free, 90 min, registration via QR code.

Education Dashboard: Still needs creation (no generator built).

DEPARTMENT: ASSOCIATE PROGRAM

Associate Program Leader: Chelsea Badjar (Level 6 Stylist)

No APL briefing today (runs Mondays). Key data points:

- **Active Associates:** Alexis White, Ali Guerrero, Teigan Maniatis
- **March performance (through 3/12):**
 - Teigan Maniatis: \$734, 90% util — on pace for \$1,300+, strong upward trajectory (Jan \$357 → Feb \$1,129)
 - Alexis White: \$444, 96% util, 32% RTS, 100% rebook — strong metrics
 - Ali Guerrero: \$38.40, 1 client — measure by salon presence (20+ hrs/week) per Philip's correction, not revenue
- **Payroll note:** Teigan has separate support staff hours at \$16.75/hr (Tue/Wed salon days) — must be tracked separately from associate wage vs. commission calc.

DEPARTMENT: MANAGER 1:1

1:1 Cadence Status

Team Member	Last 1:1	Days Ago	Status
Stacy Salee	2026-03-22	0	■ Current
Chelsea Badjar	2026-03-07	15	■■ OVERDUE
Erin Frost	2026-03-07	15	■■ OVERDUE
Kaeleigh Tran	2026-03-07	15	■■ OVERDUE
Karen Pham	2026-03-07	15	■■ OVERDUE
Kathryn Meese	2026-03-07	15	■■ OVERDUE

5 of 6 stylists are overdue for 1:1s. Recommend scheduling this week.

Recent Meeting Highlights

- **Stacy 1:1 (3/20–3/22):** Discussed Jane Iredale performance/inventory. Agreed to reduce product line by clearing slow-movers.
- **Zoom Meeting (3/20–3/22):** February review — worst month in 4 years. 386 hours lost to sick time, PTO, and training = \$24,000 revenue impact. Payroll at 76%.
- **Zoom (3/17):** Reach Properties financial reconciliation — expense tracking discrepancies, commission review.

■ Kaeleigh 1:1 Notes — March 19, 2026

Kaeleigh sent her coaching session updates:

- **Ali Guerrero:** First one-on-one. Reviewed primary goal of **50% rebooking rate**. Discussed planning and tracking progress. Addressed initial questions.
- *(Email was truncated — full content likely covers additional associates)*

Review these notes before scheduling Kaeleigh's next 1:1 (overdue since 3/7).

CUSTOMER FEEDBACK

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

Notable: Kristin Lathrom emailed (via receipt reply) — left her charger and wall plug behind the couch in the lobby. Needs someone to grab it tomorrow.

TAYLOR'S EMAILS

6 emails from Taylor (March 20) — all related to Mother's Day promo:

- **Mother's Day Gift Guide response** (8:03 PM) — Taylor finalized promo copy. Couldn't get vendor brand content but created two deals valid all of May. Responded to a publication feature request.
- **Canva designs shared** (7:29 PM) — Mother's Day Promo in landscape and portrait versions. Notes she had limited time and no updated passwords.
- **Dropbox access issue** (1:02 PM) — New branding/marketing files visible but still no updated password Excel sheet.
- **Dropbox access issue** (8:23 AM) — Password document missing, color palette and logo folders empty.
- **New hire onboarding — Nicole** (8:11 AM) — Taylor welcomed Nicole to support staff, CC'd Philip for Phorest/Paychex setup.

■ **Same-day action needed:** Taylor still needs the Dropbox password file. Confirm she has access. Also connect with Nicole for system onboarding.

EMAIL HIGHLIGHTS

- **9 Phorest daily reports** arrived (3/21 data) — Staff Tips, Performance, Appointments, Inventory, Utilisation, Clock In/Out, Sales, Gift Cards. Router processed all successfully today.
 - **Kristin Lathrom** — left charger in salon lobby, needs retrieval tomorrow.
 - **27 total emails** (15 unread) across LuganoRidge (23) and Reach (4).
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IMESSAGE

- **SimpliSafe** (3/21 5:19 PM): System armed (away mode) at 6350 W 92nd Ave. Normal.
 - No business-relevant messages in the last 48 hours. All other messages appear personal/family.
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PHOREST DATA

37 files routed successfully this morning (2026-03-22 06:01):

- Sales Transactions (PDF + XLS)
- Inventory List (PDF + XLS)
- Staff Clock In/Out (PDF + XLS)
- Staff Utilisation (PDF + XLS)

- Gift Cards Sold/Added (PDF + XLS)
- Gift Cards Redeemed (PDF + XLS)
- Staff Performance Detail Daily (ZIP x 8 — includes backlog from 3/21)
- Staff Tips Daily (ZIP x 9 — includes backlog)
- Future Appointments 90 Days (ZIP x 8 — includes backlog)

Good news: The router is working and caught up on 3/21 data with multiple accumulated runs. The Mar 16–20 gap still needs investigation.

PAYROLL SNAPSHOT

No payroll report today (runs Mondays). Key items from #yccs-payroll-review:

- **Megan King termination (PP6):** 33.6 hrs PTO payout + \$169.96 expense chargeback. Still needs GLOBAL_CONFIG cleanup.
 - **Teigan Maniatis:** Separate support staff hours (Tue/Wed) at \$16.75/hr — do NOT factor into wage vs. commission calc.
 - **Erin Frost:** Worked Thu 3/12 at \$16.75/hr support rate — same treatment as Teigan.
 - **Retail Commission:** Reminder to run prior month full retail payout.
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PAYROLL CALENDAR

Pay Period 7 | 2026-03-16 → 2026-03-29 | March 2026 (3 of 3)

- Day 7 of 14 | 5 working days remaining
 - ■ YCS Payroll Review has pending items — will process at next payroll run
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DAYTIME WATCHER

March 21 Activity: Slack-only day. 6 sync cycles ran (every 2 hours, 8 AM–6 PM). All successful.

- No new files detected in Reach Properties folders
 - No dashboard rebuilds triggered
 - No Phorest intra-day routing (reports came in overnight batch)
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AGENT STATUS

All 14 agents ran cleanly this morning. No errors across any log.

Log	Errors	Warnings
Morning runner	0	3
Phorest router	0	3

Log	Errors	Warnings
All other agents (13)	0	0

3 warnings in phorest_router — likely related to duplicate/accumulated ZIP files from the 3/21 backlog. Non-critical.

Pipeline Integrity Note: The COO scan flagged that the 7-day data gap (Mar 16–21) should have triggered a HIGH severity pipeline alert but didn't. The staleness check may not cover multi-day gaps in daily files.

Recommend: Add rule — if latest data_date in any fact table is >2 business days old, fire HIGH alert.

Positive signals: Pipeline is flowing again as of today. 37 Phorest files routed. All agent logs clean. Slack sync running every 2 hours.

Compiled 2026-03-22 06:15 | Next scheduled run: Monday 2026-03-23 06:00 AM (full Monday pipeline)