

# CEO Morning Briefing

Monday, 2026-03-23

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**Monday, March 23, 2026 — Carrera Crest Holdings**

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## TODAY'S ACTIONS

### ■ Urgent (Today)

- Investigate Phorest data gap — sales, clock-in, and tips tables are 6+ business days stale; data stops at Mar 14-15 (COO scan / pipeline alerts)
- Missing report: Gift Cards Outstanding Daily did not arrive today — check Phorest scheduled report status
- Review Taylor's Mother's Day promo designs (portrait + landscape) and respond — she's waiting on Dropbox password file and brand assets (Taylor emails, Mar 20)
- Onboard Nicole (new support staff) — Taylor sent welcome email, needs Phorest + Paychex setup (Taylor email, Mar 20)
- 1:00 PM — Mya tour & training session (Zoom)
- 3:00 PM — Pick up Luke from school

### ■ This Week

- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 16+ days overdue
- Performance conversation with Tashina Miranda — accelerating revenue decline, below associate-level at Level 2 pay (COO scan)
- Verify Ali Guerrero's in-salon hours — PP7 shows 0 hours/\$0, can't confirm 20 hrs/week mentorship (COO scan)
- Wednesday: Paychex Partnership Meeting (10:00 AM)
- Review Kaeleigh's 1:1 coaching notes — Ali's first session, rebooking goal tracking (email Mar 19)
- Check on insurance for 92H (CEO to-do — PENDING)
- Fix Dropbox access for Taylor — password file and brand content folders still empty

### ■ Queued

- Create draft TEN Salon purchase agreement email to Erin (PENDING)
- Fix 92H issues and get monthly emails established (PENDING)
- Go to DORA and update YCS license (PENDING)
- Get DORA transfer paperwork for MM (PENDING)
- Cairn Property Tax updates and payments (PENDING)
- Find wash basin pipe (PENDING)

[ ] Resolve Julie Follett fee structure for Reach Properties

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## ■ 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**

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## ■ FIRES

### 1. DATA GAP: No Phorest Data After March 15 (8 Days Missing)

All fact tables stop at Mar 14-15. An entire week of salon data is missing. Dashboards are running on stale data. The router successfully processed today's incoming files (43 files routed this morning), but the warehouse hasn't caught up. Investigate whether `ingest_daily.py` is failing to process the routed files or whether the gap is in email delivery for the Mar 16-22 period.

### 2. Tashina Miranda — Accelerating Decline

- March MTD: \$354.80 | 9 services | 36.14% utilization | \$17.10 Rev/Hr
  - Jan was \$668 — she is trending \*down\*, not up. PP7 commission: \$97.98.
  - Below associate-level production at Level 2 pay. Direct conversation needed.
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## ■ ■ WARNINGS

- **Breanna Harte** — \$0 in PP7, confirmed family leave (no action needed)
- **Teigan Maniatis** — 67.68% utilization (below 70% threshold) but ramping well (3x Jan revenue, 10 new clients)
- **Ali Guerrero** — PP7 shows 0 hours/\$0. Can't verify 20 hrs/week mentorship without clock-in data
- **Chantel Quintana** — Pacing 17% below January; rebook rate slipping 79%→75%
- **Stacy Salee** — Utilization crashed 109%→80% despite revenue growth
- **Inventory** — Mimosa at -151 units (POS tracking failure); CSV is 22 days stale
- **Feb 2026 P&L;** — Net loss of (\$4,273); payroll at 76% of revenue (target <65%); 2026 YTD revenue -31% vs budget

## TODAY'S CALENDAR

### Today — Monday, March 23

Time	Event	Location
1:00 PM – 2:00 PM	Mya tour & training session	Zoom
3:00 PM – 4:00 PM	Pick up Luke from school	—

### Tomorrow — Tuesday, March 24

No events scheduled.

### Rest of Week

- **Wed 3/25:** Paychex Partnership Meeting, 10:00–10:45 AM (WebEx)
- **Thu 3/26:** No events
- **Fri 3/27:** Luke Italy Trip (all day)
- **Sat–Sun:** Palm Sunday (3/29)
- **Mon 3/30:** Luke Spring Break begins; SS Meeting 3:00–4:00 PM

## DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Command Console	■ LIVE	Mar 22, 8:38 PM	Daily	Hub page current
Payroll Dashboard	■ LIVE	Mar 23, 6:02 AM	Daily + Mon rebuild	Current — Monday full rebuild due today
Inventory Dashboard	■ LIVE	Mar 22, 6:19 AM	Daily	24h old; data itself is stale (Mar 15)
CEO Dashboard	■ LIVE	—	Daily	—
Guest Dashboard	■ LIVE	—	Daily	Data stale due to pipeline gap
Summit Report	■ LIVE	—	Weekly	—
Reach Dashboard	■ LIVE	—	Monthly	—

Dashboard	Status	Last Updated	Schedule	Notes
P&L Flow	■ LIVE	—	Monthly	—
Slack Archive	■ LIVE	—	Daily	—
Agent Status	■ LIVE	—	Daily	—
Support Staff	■ LIVE	—	Daily	—
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator not yet built
Associate Dashboard	■ NEEDS CREATION	—	TBD	Generator not yet built
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator not yet built

## DEPARTMENT: INVENTORY

- **All inventory data is stale** — CSV last updated ~Mar 1, XLS files exist through Mar 22 but the 8-day pipeline gap means nothing after Mar 15 is in the warehouse.
- **Mimosa: -151 units** — POS tracking failure, not actual negative stock. Needs Phorest reconciliation.
- Inventory List XLS + PDF routed successfully this morning (Mar 23 data). Once the pipeline gap is fixed, this will flow through.
- Taylor's inventory briefing runs Mondays — will execute today but will reflect stale data.
- No inventory agent report available yet today.

## DEPARTMENT: EDUCATION

**Education Program Leader: Kaeleigh Tran**

**Major Update (Mar 11):** Kaeleigh posted the complete 2026 education calendar to #education (@channel):

Date	Class	Instructor	Who
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	—	**ALL STYLISTS**
Jul 8, 2-4pm	Retail: Teach, Use, Sell	Jenisa	Associates/L1
Jul 13, 10-4pm	Blonding Class	Sam Klaver	In-salon
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).

**Kerastase 2026 Virtual Education** — Free 90-min sessions available; Kaeleigh shared registration info (Mar 9).

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

## DEPARTMENT: ASSOCIATE PROGRAM

No Associate Program briefing today (runs Mondays — should execute later today).

**Current associates:** Alexis White, Ali Guerrero, Teigan Maniatis

**APL:** Chelsea Badjar (Level 6 Stylist)

**Flags from COO scan:**

- Ali Guerrero — PP7 shows 0 hours/\$0; needs hours verification
  - Teigan Maniatis — Below 70% utilization threshold but strong ramp trajectory (3x Jan revenue)
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## DEPARTMENT: MANAGER 1:1

### 1:1 Cadence Status

Team Member	Last 1:1	Status
Stacy Salee	Mar 23 (today)	■ Current
Chelsea Badjar	Mar 7	■■ 16 days — OVERDUE
Erin Frost	Mar 7	■■ 16 days — OVERDUE
Kaeleigh Tran	Mar 7	■■ 16 days — OVERDUE
Karen Pham	Mar 7	■■ 16 days — OVERDUE
Kathryn Meese	Mar 7	■■ 16 days — OVERDUE

**Recent Zoom meetings:** Stacy 1:1 today — discussed Jane product line performance, agreed to reduce slow-movers. Also reviewed February performance (worst month in 4 years — 386 hours lost to sick/PTO/training = \$24K revenue impact).

**Manager meeting notes:** Latest on file are Nov 2025, Dec 2025, Jan 2026. No Feb or Mar manager notes yet.

### ■ Kaeleigh 1:1 Notes — March 19, 2026

Kaeleigh sent coaching session updates:

- **Ali Guerrero:** First 1:1 — reviewed primary goal of maintaining 50% rebooking rate; discussed planning and progress tracking
- \*(Email was truncated — full notes may contain updates on other associates)\*

Other Kaeleigh emails (Mar 18): Kerastase Virtual Education follow-up, Kate Drinkwater business growth event responses.

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## CUSTOMER FEEDBACK

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

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## TAYLOR'S EMAILS

## 5 unique emails from Taylor (March 20) — all need review:

- **Mother's Day Gift Guide response** — Taylor sent the magazine/publication their Mother's Day specials (month of May promos). She completed the response despite not having brand assets. **Reply if edits needed.**
- **Mother's Day Promo designs (2)** — Canva designs in portrait and landscape. Taylor notes she "created with little time and not having access to updated passwords." **Review designs and provide feedback.**
- **Dropbox access issue** — Taylor still can't find the password file or marketing assets (logo folders empty, color palette empty). **Same-day: Fix Dropbox sharing/permissions.**
- **Nicole onboarding** — Taylor welcomed Nicole (new support staff) and connected her to Philip for Phorest + Paychex setup. **Action: Complete Nicole's system setup.**

No briefing replies from Taylor in the last 3 days.

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## EMAIL HIGHLIGHTS

- **StyleNet payment confirmation** — \$119.00 payment received for YCS account #4348
- **Phorest Week in Review (Mar 16-22):** 237 client visits, \$111 avg bill, \$26K weekly revenue
- **11 Phorest report emails** received and routed (see Phorest Data below)
- **Hartford auto-payment** — \$491.40 scheduled for today (iMessage confirmation)

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## IMESSAGE

- **The Hartford (Mar 23, 2:19 AM):** Auto-payment of \$491.40 scheduled for today. No action needed unless you want to adjust.

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## PHOREST DATA

**43 files routed this morning** (all at 06:01 AM). Full breakdown:

Report	Format	Status
Sales Transactions	XLS + PDF	■ Routed
Inventory List	XLS + PDF	■ Routed
Staff Clock In-Out	XLS + PDF	■ Routed
Staff Utilisation	XLS + PDF	■ Routed
Gift Cards Sold	XLS + PDF	■ Routed
Gift Cards Redeemed	XLS + PDF	■ Routed
Staff Performance Detail	ZIP (multiple days)	■ Routed
Staff Tips Daily	ZIP (multiple days)	■ Routed
Future Appointments 90 Days	ZIP (multiple days)	■ Routed
Gift Cards Outstanding	—	■ <b>**MISSING**</b>

**Note:** Multiple backlogged ZIP files from Mar 20-22 were also routed — these may close the data gap once ingested. The pipeline gap may be an ingest issue, not a delivery issue.

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## PAYROLL SNAPSHOT

No payroll report today (runs Mondays — should execute later today).

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## PAYROLL CALENDAR

**Pay Period 7** (2026-03-16 → 2026-03-29) — March 2026, Period 3 of 3

Day 8 of 14 | **4 working days remaining**

**Pending items in #yacs-payroll-review:**

- PP6 items (processed): Megan King termination, 33.6h PTO payout, -\$169.96 chargeback
  - Teigan bonus hours at \$16.75/hr (support staff rate, separate from associate wage/commission calc)
  - Erin Frost 3/12 hours at \$16.75/hr (same treatment)
  - Reminder: Run prior month full retail commission payout
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## DAYTIME WATCHER

Watcher idle — no intra-day changes detected since last scheduled run.

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## AGENT STATUS

**Pipeline ran at 6:01 AM — all 15 agents executed, 0 errors.**

Component	Status
Runner (morning)	■ 4 warnings
Phorest Router	■ 3 warnings (likely Gift Cards Outstanding missing)
Ingest Daily	■ No errors
Briefing Compiler	■
Calendar Export	■
COO Daily Scan	■
Mail/Outlook/iMessage Export	■
Slack Sync	■
Zoom Router	■

### ■ Pipeline Alerts (HIGH)

- **Sales Transactions** — latest data: Mar 14 (6 business days stale)

- **Staff Clock In/Out** — latest data: Mar 15 (6 business days stale)
- **Staff Tips** — latest data: Mar 14 (6 business days stale)
- **Gift Cards Outstanding** — report did not arrive today

**Root cause hypothesis:** Backlogged ZIPs from Mar 20-22 were routed this morning. If `ingest_daily.py` processes them, the gap should close. Check whether ingest ran *after* routing completed, or if it needs a manual re-run.