

CEO Morning Briefing

Tuesday, 2026-03-24

Tuesday, March 24, 2026 | Carrera Crest Holdings

TODAY'S ACTIONS

■ Urgent (Today)

- Investigate missing Phorest report: "Gift Cards Outstanding Daily" did not arrive today — check email inbox and Phorest scheduled report settings (Pipeline Alert)
- Review & respond to Taylor's Mother's Day promo emails from 3/20 — she needs Dropbox password file and brand assets (Taylor Emails)
- Review Taylor's Mother's Day Canva designs and write-up for magazine feature (Taylor Emails)
- Connect Nicole (new support staff hire) with Phorest and Paychex setup per Taylor's 3/20 email (Taylor Emails)
- Tomorrow 10:00 AM: Paychex Partnership Meeting — prep needed (Calendar)

■ This Week

- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 17+ days overdue (1:1 Cadence)
- Review Kaeleigh's 3/19 One on One Notes on Ali's coaching session (Kaeleigh Email)
- Check on insurance for 92H (CEO To Do — PENDING)
- Draft TEN Salon purchase agreement email to Erin (CEO To Do — PENDING)
- Go to DORA and update YCS license (CEO To Do — PENDING)
- Get DORA transfer paperwork for MM (CEO To Do — PENDING)
- Address Feb net loss (\$4,273) and 76% payroll ratio — review staffing mix (P&L;)

■ Queued

- Fix 92H issues and get monthly emails established (CEO To Do — PENDING)
 - Cairn Property Tax updates and payments (CEO To Do — PENDING)
 - Find wash basin pipe (CEO To Do — PENDING)
 - Complete Operating Agreements for Cairn Crest and Lugano Crest (CEO To Do — ~~DONE~~ per update)
 - Create Education Dashboard (Dashboard — needs creation)
 - Create Associate Program Dashboard (Dashboard — needs creation)
 - Create Marketing Dashboard (Dashboard — needs creation)
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■ CEO TO DO

| Item | Status |
|---|---------|
| 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 payments to Reach Partners Owners / Julie Follett issue | DONE |
| Create template/documentation for Carrera Crest Automation as a service | DONE |
| Fix 92H issues and get 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 Operating Agreements for Cairn Crest and Lugano Crest | DONE |

7 items PENDING / 10 items DONE

FIRES

COO daily scan did not complete — it was blocked waiting for permission to access fact tables in `data/facts/`. No data-driven anomaly detection ran today. The scan output is based on config files only.

Known fire from P&L; data: Feb 2026 was a net loss of (\$4,273) with payroll at 76% of revenue (threshold: 65%). 2026 YTD revenue is -31.0% vs budget.

WARNINGS

- **Payroll ratio:** 76% in Feb — well above 65% target. 386 hours lost to sick time, PTO, and training contributed to \$24K revenue gap (per Zoom meeting summary).
 - **Mar 2026 pacing:** \$60,398 MTD through day 24 — annualizing ~\$75K/mo, below 2025 avg of \$116K/mo.
 - **Jane product line:** Under review per Stacy 1:1 — agreed to reduce line and clear slow movers.
 - **Gift Cards Outstanding report missing** — may indicate Phorest scheduling issue.
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TODAY'S CALENDAR

Today (Tuesday 3/24): No events scheduled. Clear day.

Tomorrow (Wednesday 3/25):

- 10:00–10:45 AM: Lugano Ridge / Paychex Partnership Meeting (WebEx) — 45 min

Rest of Week:

- Thu 3/27: Luke Italy Trip (all day, family)
- Fri 3/28: No events
- Sat 3/29: Palm Sunday
- Sun 3/30: Luke Spring Break begins; SS Meeting 3–4 PM
- Mon 3/31: Redken Black Level Luncheon 10 AM–1 PM @ EDGE Restaurant, Denver

DASHBOARD STATUS

| Dashboard | Status | Last Updated | Schedule | Notes |
|-----------------------------|------------------|------------------|---------------------|------------------------------------|
| Payroll Dashboard | ■ LIVE | 2026-03-24 06:06 | Daily + Mon rebuild | Current |
| Inventory Dashboard | ■ LIVE | 2026-03-23 06:16 | Daily | 24h old — will refresh tomorrow AM |
| Web Station Index | ■ LIVE | 2026-03-23 18:53 | Daily | Current |
| CEO Briefing | ■ LIVE | Today | Daily 6 AM | This document |
| P&L Flow | ■ LIVE | 2026-03-23 | Monthly/as needed | Mar data partial |
| Slack Archive | ■ LIVE | 2026-03-23 18:52 | Every 2h (watcher) | Current |
| Agent Status | ■ LIVE | Daily | Daily | Current |
| Guest Dashboard | ■ LIVE | — | Daily | — |
| Summit Report | ■ LIVE | — | Weekly | — |
| Support Staff | ■ LIVE | — | Daily | — |
| Reach Dashboard | ■ LIVE | — | Weekly | — |
| Deal Pipeline | ■ LIVE | — | Wednesday | — |
| 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). Last inventory dashboard update: 2026-03-23.

From 1:1 notes (Stacy, 3/24): Jane product line underperforming — agreed to reduce SKUs and clear slow movers. Monitor sell-through on remaining Jane inventory.

No reorder alerts or stockout flags available today. Next full inventory scan: Monday 3/30.

DEPARTMENT: EDUCATION

Education Program Leader: Kaeleigh Tran

■ **Major Update (Mar 11):** Kaeleigh posted the full 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 mandatory** |
| 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).

Kerastase virtual education schedule shared — all free, 90-min sessions, registration via QR.

Dashboard: 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). Active associates: Alexis White, Ali Guerrero, Teigan Maniatis.

Note from payroll: Teigan has split hours — salon support hours at \$16.75/hr tracked separately from associate wage. Erin Frost also worked support hours on 3/12 at \$16.75/hr.

Next APL briefing: Monday 3/30.

DEPARTMENT: MANAGER 1:1

1:1 Cadence Status:

| Team Member | Last 1:1 | Status |
|-------------|------------|----------------------|
| Stacy | 2026-03-24 | ■ Current |
| Chelsea | 2026-03-07 | ■■ 17 days — OVERDUE |
| Erin | 2026-03-07 | ■■ 17 days — OVERDUE |
| Kaeleigh | 2026-03-07 | ■■ 17 days — OVERDUE |
| Karen | 2026-03-07 | ■■ 17 days — OVERDUE |
| Kathryn | 2026-03-07 | ■■ 17 days — OVERDUE |

5 of 6 stylists are overdue for 1:1s. Consider scheduling a block this week.

Recent 1:1 — Stacy (3/24): Discussed Jane product performance and inventory. Agreed to reduce the line by clearing slow movers. Also reviewed Feb performance — worst month in 4 years, 386 hours lost to sick/PTO/training = \$24K revenue gap.

Zoom meetings (3/17): Financial records review for rental properties — reconciling expenses, commissions with Juju/Yacht.

■ Kaeleigh 1:1 Notes — March 19, 2026

Kaeleigh sent her coaching session update:

- **Ali:** First one-on-one completed. Reviewed primary goal of 50% rebooking rate. Discussed tracking and planning methods. Addressed initial questions.
- *(Email truncated — read full notes for complete update on other associates)*

CUSTOMER FEEDBACK

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

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 submitted salon Mother's Day specials for magazine feature. Valid all month of May. Has deals ready but couldn't get all vendor brand content.
- **Canva designs** (7:29 PM) — Landscape and portrait versions of Mother's Day Promo created. Taylor notes she had limited time and no access to updated passwords.
- **Dropbox access issue** (1:02 PM) — Taylor found new branding/marketing files but still can't find updated password Excel sheet.
- **Missing assets** (8:23 AM) — Color palette and logo folders are empty in Dropbox. Password file missing.
- **Needs resolution — Taylor is blocked.**
- **New hire onboard** (8:11 AM) — Taylor welcomed Nicole to support staff. Philip needs to set up Phorest and Paychex access.

■ **Same-day action:** Taylor needs the Dropbox password file and brand assets restored. She's been waiting since 3/19.

TAYLOR'S BRIEFING REPLIES

No briefing replies from Taylor in the last 3 days.

EMAIL HIGHLIGHTS

- **Salon Centric Flash Sale:** 20% off Redken + Framar Pop-Up Foils (x2 emails)
- **Kerastase:** Friends & Family assets and additional marketing media
- **SimpliSafe:** 92H system armed (away mode) at 10:06 PM 3/23 — normal
- 92 total emails (54 unread) across LuganoRidge (71) and Reach (21). 9 Phorest report emails — all routine daily reports.

IMESSAGE

SimpliSafe notifications only — no business-relevant messages:

- 92H entry sensor restored (1:46 AM today)
- 92H system armed away mode (10:06 PM 3/23)

PHOREST DATA

37 reports routed at 06:05 AM today. All 10 expected report types received:

| Report | Format | Status |
|-----------------------------|-----------|-----------|
| Sales Transactions | XLS + PDF | ■ |
| Inventory List | XLS + PDF | ■ |
| Staff Clock In-Out | XLS + PDF | ■ |
| Staff Utilisation | XLS + PDF | ■ |
| Gift Cards Sold & Added | XLS + PDF | ■ |
| Gift Cards Redeemed | XLS + PDF | ■ |
| Staff Tips Daily | ZIP | ■ |
| Staff Performance Detail | ZIP | ■ |
| Future Appointments 90 Days | ZIP | ■ |
| **Gift Cards Outstanding** | — | ■ MISSING |

■■■ **Gift Cards Outstanding Daily did not arrive.** Check Phorest scheduled report and Looker email delivery.

Note: Multiple duplicate ZIPs routed for Tips, Performance, and Appointments (backlog copies from 3/23 watcher cycles). No harm — ingest deduplicates.

PAYROLL SNAPSHOT

No payroll report today (runs Mondays).

From #ycs-payroll-review — pending items for PP7:

- Teigan split hours: Tue/Wed salon support hours at \$16.75/hr, separate from associate wage (not in wage vs. commission calc)
- Erin Frost: Thu 3/12 support hours at \$16.75/hr, also excluded from wage vs. commission

- Retail commission: Prior month full retail payout reminder (carry-forward from PP6)
 - Megan King termination processed in PP6 (33.6 hrs PTO payout, -\$169.96 chargeback)
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PAYROLL CALENDAR

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

- **Day 9 of 14** | 3 working days remaining
 - **■** YCS Payroll Review has pending items (Teigan split hours, Erin support hours, retail commission reminder)
 - Next payroll processing: Monday 3/30 (PP7 close + biweekly run)
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DAYTIME WATCHER (3/23)

Watcher ran 6 cycles (8 AM – 6 PM) — **Slack-only activity:**

- 6 Slack sync + archive dashboard refreshes (every 2 hours)
 - No new Phorest files detected mid-day
 - No new Reach/AIRBNB/VRBO files detected
 - No emergency alerts triggered
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AGENT STATUS

Pipeline: All agents healthy. 0 errors across all 15 logs.

| Log | Errors | Warnings |
|-----------------|--------|----------|
| runner_morning | 0 | 4 |
| phorest_router | 0 | 3 |
| All others (13) | 0 | 0 |

■ Pipeline Alert: Gift Cards Outstanding Daily report missing from today's Phorest delivery. All other 9 report types arrived and routed successfully. **Action:** Check (1) apple_mail_export captured the email, (2) email exists in inbox from noreply@lookermail.com, (3) Phorest scheduled report is still active.

■■ COO scan incomplete — blocked on fact table file permissions. Data-driven anomaly detection did not run. Config-only scan completed.

All critical fact tables are current (per staleness check).
