

CEO Morning Briefing

Wednesday, 2026-03-25

Wednesday, March 25, 2026 | Carrera Crest Holdings

TODAY'S ACTIONS

■ Urgent (Today)

- Investigate missing gc_sold.csv fact table — pipeline alert HIGH, Gift Cards Sold data never produced (Pipeline Alert)
- 10:00 AM — Paychex Partnership Meeting via WebEx (Calendar)
- Review & respond to Taylor's email re: Mother's Day Gift Guide magazine ad (Taylor Email — sent last night)
- SimpliSafe sensor alert: RoofTop Entry sensor not responding at 92H (6350 W 92nd Ave) since 12:15 AM (iMessage + Email)
- COO Daily Scan blocked — file read permissions not granted, no COO data today (Agent Status)

■ This Week

- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 18 days overdue (1:1 Cadence)
- Review Kaeleigh's 1:1 coaching notes from Mar 19 — Ali's first session, rebooking goals (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;)
- Respond to jstebner@icloud.com — "Around tomorrow" (iMessage)

■ 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)
- Get a Chase CC for Lugano Crest (CEO To Do — PENDING)
- Complete and send Operating Agreements for Cairn Crest and Lugano Crest (CEO To Do — marked DONE but verify)
- Create Education Dashboard (not yet built)
- Create Associate Program Dashboard (not yet built)

- [] Create Marketing Dashboard (not yet built)
 - [] Cancel SalesNavigator PRO by Apr 1 (Calendar)
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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 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
- Get a Chase CC for Lugano Crest — NEW

7 PENDING | 10 DONE | 1 NEW

FIRES

COO Daily Scan did not run — agent was blocked waiting for file read permissions. No COO fire/warning data available today. This is a system gap, not an all-clear.

WARNINGS

- **Feb 2026 Net Loss:** (\$4,273) with payroll at 76% of revenue. 386 hours lost to sick time, PTO, and training drove \$24,000 revenue shortfall (per Zoom meeting review).
- **2026 YTD Revenue:** -31% vs budget (\$264,762 through Feb). Mar pacing ~\$72K annualized.
- **92H Sensor Alert:** SimpliSafe RoofTop Entry sensor not responding since 12:15 AM.

- **gc_sold.csv missing:** Pipeline has never produced this fact table despite Gift Cards Sold reports being routed daily.

TODAY'S CALENDAR

Today — Wednesday, March 25

Time	Event	Location	Duration
10:00 AM	Lugano Ridge LLC & Paychex Partnership Meeting	WebEx (link in calendar)	45 min

Tomorrow — Thursday, March 26

No events scheduled.

Rest of Week

- **Fri 3/27:** Luke Italy Trip (all day)
- **Sun 3/29:** Palm Sunday

Next Week Preview

- **Mon 3/30:** Luke Spring Break (all day) · SS Meeting 3:00–4:00 PM
- **Tue 3/31:** Redken Inspires Black Level Luncheon 10:00 AM–1:00 PM @ EDGE Restaurant, Denver
- **Wed 4/1:** Passover · Cancel SalesNavigator PRO 9:30–10:30 AM

DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Command Console	■ LIVE	Mar 24, 10:30 AM	Daily	20h old
Payroll Dashboard	■ LIVE	Mar 25, 06:04 AM	Daily + Mon rebuild	Current
Inventory Dashboard	■ LIVE	Mar 24, 06:19 AM	Daily	24h old
CEO Briefing	■ LIVE	Mar 25 (today)	Daily 6 AM	Current
Summit Report	■ LIVE	—	Weekly	—
P&L Flow	■ LIVE	—	Monthly	—
Reach Dashboard	■ LIVE	—	—	—
Slack Archive	■ LIVE	—	Daily	—
Agent Status	■ LIVE	—	Daily	—
Guest Dashboard	■ LIVE	—	—	—
Support Staff	■ LIVE	—	—	—
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator not built
Associate Dashboard	■ NEEDS CREATION	—	TBD	Generator not built
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator not built

DEPARTMENT: INVENTORY

No inventory report today (runs Mondays). Key context from recent 1:1 data:

- **Jane Products:** Stacy and Philip agreed to reduce the Jane product line — clearing slow-moving inventory. Decision made in this week's 1:1s.
 - **Inventory Dashboard:** Live, last updated Mar 24 06:19. 1,585 rows in inventory_on_hand.csv (current).
 - **Phorest Inventory List:** Routed today (PDF + XLS) — will be ingested in next daily run.
 - Next full inventory report: Monday Mar 30.
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DEPARTMENT: EDUCATION

Education Program Leader: Kaeleigh Tran (NOT Chelsea Badjar)

Master Class Calendar (posted Mar 11) — Kaeleigh published the full 2026 education schedule:

Date	Class	Instructor	Audience
Apr 8, 2–4pm	Summit Tracking/Planning for Success	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

- **Kerastase Virtual Education:** Free 90-min sessions available via QR code (shared Mar 9).
 - **Completed:** Bello Haven Extension Class (Mar 2, 11 attended), Kerastase Refresher w/ Nicole (Feb 24), Exceptional Salon Service (Feb 16).
 - **Education Dashboard:** Not yet built — data sources identified (Slack #education, Kaeleigh emails, Phorest training, CEU tracking).
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DEPARTMENT: ASSOCIATE PROGRAM

Associate Program Leader: Chelsea Badjar (Level 6 Stylist — separate from Education/Kaeleigh)

No APL briefing today (runs Mondays). Active associates: Alexis White, Ali Guerrero, Teigan Maniatis.

- Megan King terminated Mar 7 (PP6) — fully removed from active roster.
 - Teigan had support staff hours in early March at \$16.75/hr (tracked in payroll).
 - Next APL briefing: Monday Mar 30.
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DEPARTMENT: MANAGER 1:1

1:1 Cadence Status

Team Member	Last 1:1	Status
Stacy	Mar 25 (today)	■ Current
Chelsea	Mar 7	■■ 18 days — OVERDUE
Erin	Mar 7	■■ 18 days — OVERDUE
Kaeleigh	Mar 7	■■ 18 days — OVERDUE
Karen	Mar 7	■■ 18 days — OVERDUE
Kathryn	Mar 7	■■ 18 days — OVERDUE

5 of 6 stylists overdue for 1:1s. Consider scheduling a catch-up block this week or next.

Recent 1:1 — Stacy (Mar 25)

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

■ Kaeleigh 1:1 Notes — Mar 19

Kaeleigh sent coaching session updates:

- **Ali:** First 1:1 session — reviewed primary goal of maintaining 50% rebooking rate, discussed tracking and planning methods, addressed initial questions.
- *(Email truncated — full detail in inbox)*

Other Kaeleigh Emails (Mar 18)

- Re: Kerastase Virtual Education Calendar
- Re: Join Us for Business-Growth Experience with Kate Drinkwater (2 replies)

Manager Notes on File

Nov 2025, Dec 2025, Jan 2026 manager notes available. Feb/Mar 2026 manager notes not yet generated.

CUSTOMER FEEDBACK

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

TAYLOR'S EMAILS

1 email found (Mar 24, 9:19 PM)

Subject: Re: Mother's Day Gift Guide – Featured Business for May Issue

Taylor replied to Sarah declining the suggested changes and proceeding with the original plan:

- 20% off gift cards
- "Pairs that Pamper" — 20% *(message truncated)*

Action needed: Review Taylor's response to ensure the magazine ad copy is correct. No same-day reply needed, but verify the promotions before print deadline.

Taylor's Briefing Replies: None in the last 3 days.

EMAIL HIGHLIGHTS

- **SalonCentric** (x2): Order confirmation — inventory order placed and received.
- **SimpliSafe:** 92H RoofTop Entry sensor error at 12:15 AM — needs investigation.
- **Phorest/Looker:** 10 daily reports delivered normally (Staff Performance, Tips, Appointments, Utilisation, Inventory, Clock In-Out, GC Sold/Redeemed/Outstanding, Sales Transactions).

111 total emails (33 unread). Most unread are Phorest reports and marketing — nothing else flagged.

IMESSAGE

- **SimpliSafe (12:15 AM):** 92H sensor alert — RoofTop Entry not responding. Same as email alert.
 - **jstebner@icloud.com (10:30 PM):** "Around tomorrow" — may need a reply to confirm plans.
 - **Spam (Mar 23):** Fake Amazon recruiting message — ignore.
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PHOREST DATA

All 10 expected report types routed successfully at 06:03 AM:

- Staff Performance Detail, Staff Tips, Future Appointments 90 Days (ZIP)
- Sales Transactions, Staff Clock In-Out, Inventory List, Staff Utilisation (XLS + PDF)
- Gift Cards Sold, Redeemed, Outstanding (XLS + PDF)

Note: Multiple duplicate copies of Mar 24 reports also routed (stacked filenames from Daytime Watcher re-runs) — no data loss, just file clutter.

PAYROLL SNAPSHOT

No payroll report today (runs Mondays).

Key items in #ycs-payroll-review queue (PP6 carryover):

- Megan King termination processed: 33.6 hrs PTO payout, \$169.96 expense chargeback
 - Teigan: Support staff hours (Tue/Wed) at \$16.75/hr — separate from associate wage
 - Erin Frost: Support staff hours Thu 3/12 at \$16.75/hr — exclude from wage vs commission
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PAYROLL CALENDAR

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

- Day 10 of 14 | **2 working days remaining**
 - Pending items in #yca-payroll-review will process at next payroll run
 - No biweekly auto-trigger today
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DAYTIME WATCHER

Mar 24 Activity: Slack-only day — 6 sync cycles (8 AM through 6 PM, every 2 hours). No new file drops, no Phorest re-routes, no dashboard rebuilds triggered intra-day.

AGENT STATUS

Pipeline Health: 0 errors across all 15 agent logs. 7 warnings total (3 in phorest_router, 4 in runner_morning) — non-critical.

■ PIPELINE ALERT — HIGH

- **gc_sold.csv does not exist.** Gift Cards Sold reports are being routed daily (XLS + PDF delivered today), but the fact table has never been produced. The ingest pipeline is either not mapping this report type or the output file is misnamed. This means Gift Card sales data is not flowing into dashboards.

COO Agent: Blocked — waiting for file read permissions. No daily scan output today.

All other agents: Ran clean. Briefing compiler, calendar, iMessage, mail, Outlook, Slack, Zoom, warehouse health, vendor learning — all 0 errors, 0 warnings.

Compiled 2026-03-25 06:04 AM | Next briefing: Thu Mar 26, 6:00 AM
