



CARRERA CREST HOLDINGS

# CEO Morning Briefing

Saturday, 2026-03-28

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**Saturday, March 28, 2026 | Carrera Crest Holdings**

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## TODAY'S ACTIONS

### ■ Urgent (Today)

- Respond to staff callout — someone texted 10:02 PM last night that their mom broke ribs, needs to stay home today (+17206903435). Confirm coverage.
- Complete Hartford online account setup — 2 welcome emails waiting (insurance, final step required)
- PP7 ends TOMORROW (3/29) — review #ycs-payroll-review for any last pending items before close

### ■ This Week

- Deana Faust Level 3 promotion — update Phorest level + Paychex payroll rate BEFORE PP8 starts April 1
- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 21+ days overdue
- SS meeting IN PERSON — Tuesday 3/31 at 8:30 AM
- Redken Black Level Luncheon — Tuesday 3/31 at 10:00 AM (EDGE Restaurant, Denver)
- Cancel SalesNavigator PRO — reminder Wednesday 4/1 at 9:30 AM
- Review Feb P&L;: payroll at 76% of revenue, net loss (\$4,273) — investigate staffing mix

### ■ Queued (CEO TO DO — Pending)

- Check on insurance for 92H
  - Create draft TEN Salon purchase agreement email to Erin
  - Fix 92H issues and get monthly emails established
  - Go to DORA and update YCS license
  - Get DORA transfer paperwork for MM
  - Cairn Property Tax updates and payments
  - Find wash basin pipe
  - Get a Chase CC for Lugano Crest
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## ■ CEO TO DO

**PENDING:**

- Check on insurance for 92h
- Create a draft of TEN Salon purchase agreement email to Erin
- Fix 92H issues and get the monthly emails established
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#### DONE:

- ~~Create the TEN Salon lease proposal and send out~~
- ~~Email Melissa at Bello Haven for pricing info~~
- ~~Follow up on Reach Partners Owners / Julie Follett issue~~
- ~~Create template/documentation for Carrera Crest Automation~~
- ~~Text MM about timing of transfer~~
- ~~Follow up on Boulevard access~~
- ~~Go To Chase about 2 new accounts~~
- ~~Deposit more cash~~
- ~~Pay Parking ticket~~
- ~~Complete and send Operating Agreements for Cairn Crest and Lugano Crest~~

#### ■ ACTION REQUIRED — Deana Faust Level 3 Promotion

PP8 starts April 1, 2026 — must be done before then.

- Update Phorest — change Deana's service level to Level 3
- Update payroll rate — confirm new commission rate with Kaeleigh, update Paychex

Tag Kaeleigh once done to confirm.

## FIRES

COO daily scan did not complete — agent requested permission approvals and did not produce output. No fires identified from available data.

## WARNINGS

- **Feb net loss:** (\$4,273) with payroll at 76% of revenue — above 75% threshold
- **2026 YTD revenue:** -31.0% vs budget (\$264,762 through Feb)
- **Mar pacing:** \$60,398 MTD through day 28 — annualizing ~\$64,712/mo vs \$116K 2025 avg
- **Staff callout:** +17206903435 texted last night — mom broke ribs, staying home today. Check Saturday coverage.

- **Phorest router:** 3 warnings in today's log — review if routing gaps exist
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## TODAY'S CALENDAR

**Saturday, March 28** — No events scheduled. Weekend.

**Tomorrow (Sunday, March 29)** — Palm Sunday (holiday). No business events.

### Week Ahead:

- **Tue 3/31:** SS meeting IN PERSON 8:30–9:30 AM | Redken Black Level Luncheon 10:00 AM–1:00 PM (EDGE Restaurant, Denver)
  - **Wed 4/1:** Passover | Cancel SalesNavigator PRO 9:30–10:30 AM
  - **Fri 4/3:** Good Friday
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## DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	■ LIVE	2026-03-28 06:03	Daily + Mon rebuild	Current
Inventory Dashboard	■ LIVE	2026-03-27 06:09	Daily	24h old — normal for Saturday
Command Console	■ LIVE	2026-03-27 08:06	Daily	Current
CEO Dashboard	■ LIVE	—	Weekly	Check staleness
Summit Report	■ LIVE	—	Weekly	Rebuilt 3/27
Guest Dashboard	■ LIVE	—	Weekly	Rebuilt 3/27
P&L Flow	■ LIVE	—	Monthly	Current
Reach Dashboard	■ LIVE	—	Weekly	Current
Slack Archive	■ LIVE	—	Daily	Current
Agent Status	■ LIVE	—	Daily	Current
Support Staff	■ LIVE	—	Daily	Current
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator TBD
Associate Dashboard	■ NEEDS CREATION	—	TBD	Generator TBD
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator TBD

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## DEPARTMENT: INVENTORY

No inventory report today (runs Mondays). Last dashboard update: 2026-03-27.

- **Jane products:** Stacy/Philip agreed to reduce the line — clearing slow movers (from 1:1 notes)
  - No reorder alerts or pipeline alerts flagged
  - All 10 Phorest reports routed successfully this morning including Inventory List (XLS + PDF)
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## DEPARTMENT: EDUCATION

Leader: Kaeleigh Tran

### Upcoming Classes:

- **Apr 8, 2–4 PM:** Summit Tracking/Planning for Success w/ Chelsea (mandatory 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
- **June 3, 2–4 PM:** Kerastase Refresher — **MANDATORY FOR ALL STYLISTS**
- **July 13, 10 AM–4 PM:** Blonding Class w/ Sam Klaver (in-salon)

### Recent Activity:

- Mar 11: Kaeleigh posted full 2026 education calendar to #education (@channel)
- Mar 9: Sam Klaver Blonding class announced (July 13) — 5 ❤️👍 reactions
- Mar 9: Shared Kerastase free virtual education schedule (90-min sessions, QR registration)
- Kerastase refresher with Nicole (Feb 24) and Bello Haven Extension Class (Mar 2) both completed

**Dashboard:** Still needs creation — generator TBD.

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## DEPARTMENT: ASSOCIATE PROGRAM

Leader: Chelsea Badjar (APL, Level 6 Stylist)

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

- Teigan had support staff hours in PP6 at \$16.75/hr (tracked in payroll review)
  - Ali's first 1:1 with Kaeleigh recently — focused on 50% rebooking rate goal (from Kaeleigh's notes)
  - Associate Dashboard still needs creation
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## DEPARTMENT: MANAGER 1:1

### Recent 1:1s:

- **Stacy:** Last 1:1 Mar 26 (2 days ago) ■ — Discussed Jane product reduction, Feb performance review (worst month in 4 years, 386 hrs lost to sick/PTO/training = \$24K revenue gap)

### ■■ OVERDUE (21+ days):

- Chelsea — last 1:1 Mar 7
- Erin — last 1:1 Mar 7
- Kaeleigh — last 1:1 Mar 7
- Karen — last 1:1 Mar 7
- Kathryn — last 1:1 Mar 7

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

Kaeleigh sent coaching session updates:

- **Ali:** First 1:1 — reviewed primary goal of 50% rebooking rate, discussed planning and tracking progress, addressed initial questions
- (Email preview truncated — full notes available in inbox)

No 1:1 notes from Kaeleigh this week (last was Mar 19).

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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

No emails from Taylor in the last 3 days.

**TAYLOR'S BRIEFING REPLIES:** No briefing replies from Taylor in the last 3 days.

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## EMAIL HIGHLIGHTS

- **The Hartford** (x2): "Welcome — One Final Step!" — complete online account setup (policy number starts with 7). Action required.
  - **141 total emails** (40 unread) — 132 LuganoRidge, 9 Reach. 10 Phorest reports received and routed.
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## IMESSAGE

- **+17206903435** (Mar 27, 10:02 PM): "My mom broke her ribs tonight, so I'll need to stay home tomorrow. Sorry for the inconvenience." → **Saturday callout — check coverage.**
  - **SimpliSafe** (Mar 27, 8:14 PM): System armed (away mode) at 6350 W 92nd Ave.
  - No other business-relevant messages.
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## PHOREST DATA

All 10 expected reports routed successfully at 06:02 AM:

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

■■■ 3 warnings in phorest\_router.log — likely duplicate file timestamps from Daytime Watcher re-routing. Non-critical.

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## PAYROLL SNAPSHOT

No payroll report today (runs Mondays).

### Key items in #ycs-payroll-review:

- PP6: Megan King termination processed (33.6 hrs PTO payout, -\$169.96 chargeback)
  - PP6: Teigan support staff hours at \$16.75/hr (separate from associate wage)
  - PP6: Erin Frost support hours 3/12 at \$16.75/hr
  - Reminder: Run prior month full retail commission payout
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## PAYROLL CALENDAR

Pay Period 7 (2026-03-16 → 2026-03-29) — Day 13 of 14

- **PP7 ends tomorrow** — 0 working days remain. Review any pending items.
  - YCS Payroll Review has pending items to process at next run.
  - PP8 starts April 1 — Deana Faust Level 3 promotion must be in Phorest + Paychex before then.
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## DAYTIME WATCHER (MAR 27)

Watcher ran 4 cycles (12 PM, 2 PM, 4 PM, 6 PM). Activity:

- **Slack sync** at each cycle — channel changes detected and refreshed (archive sync)
  - No new file detections or dashboard rebuilds triggered intra-day
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## AGENT STATUS

All systems green. 15 logs reviewed — 0 errors across all agents.

Log	Errors	Warnings
Morning pipeline	0	4
Phorest router	0	3
All other agents (13)	0	0

Pipeline alerts: None. Data staleness alerts: None. All critical fact tables current.

■■ COO daily scan did not complete — agent output was a permission request rather than scan results. COO scan data missing from this briefing.

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