



CARRERA CREST HOLDINGS

CEO Morning Briefing

Sunday, 2026-03-29

Sunday, March 29, 2026 | Carrera Crest Holdings

TODAY'S ACTIONS

■ Urgent (Today)

- PP7 ends today — add any final payroll adjustments to #yccs-payroll-review before tomorrow's 6 AM run
- Deana Faust Level 3 promotion must be in Phorest + Paychex before PP8 starts April 1 (confirmed qualified: \$406/day avg, retail \$42/day)

■ This Week

- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 22+ 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 — Wednesday 4/1 at 9:30 AM
- Review Feb 2026 net loss (\$4,273) and 76% payroll ratio — investigate staffing mix
- Check on insurance for 92H (PENDING)
- Draft TEN Salon purchase agreement email to Erin (PENDING)
- Cairn Property Tax updates and payments (PENDING)

■ Queued

- Fix 92H issues and get monthly emails established (PENDING)
 - Go to DORA and update YCS license (PENDING)
 - Get DORA transfer paperwork for MM (PENDING)
 - Find wash basin pipe (PENDING)
 - Get a Chase CC for Lugano Crest
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■ CEO TO DO

PENDING items:

- Check on insurance for 92h PENDING
- Create a draft of TEN Salon purchase agreement email to Erin PENDING
- 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
- Cairn Property Tax updates and payments PENDING
- Find wash basin pipe PENDING
- Get a Chase CC for Lugano Crest

COMPLETED items (cleared from active list):

- ~~Create the TEN Salon lease proposal and send out~~ DONE
- ~~Email Melissa at Bello Haven for pricing info~~ DONE
- ~~Follow up on Reach Partners Owners / Julie Follett issue~~ DONE
- ~~Create template/documentation for Carrera Crest Automation~~ DONE
- ~~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
- ~~Pay Parking ticket~~ DONE
- ~~Complete and send Operating Agreements for Cairn Crest and Lugano Crest~~ DONE

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

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

- Dec + Jan + Feb all qualified: \$406/day avg vs \$374 threshold ■
- Retail \$42/day hit ■
- Kaeleigh confirmed via Slack group DM (Mar 17)
- Update Phorest — change Deana's service level to Level 3
- Update payroll rate — confirm new commission rate with Kaeleigh and update in Paychex

FIRES

COO daily scan did not execute — agent requested filesystem access but could not run the scan. No fires detected from available data. Pipeline and warehouse health checks show no alerts.

WARNINGS

- **Feb 2026 net loss:** (\$4,273) — salon ran at a 4.6% loss. Payroll at 76% of revenue (target <65%).
- **2026 YTD revenue -31%** vs budget (\$264,762). Feb was worst month in 4 years per Zoom summaries — 386 hours lost to sick time, PTO, and training (\$24K revenue impact).
- **Mar 2026 MTD:** \$60,398 through day 29 — pacing ~\$62K, well below 2025 avg of \$116K/mo.
- **Phorest router:** 3 warnings in today's log — review if any reports failed routing.
- **Runner morning:** 4 warnings — no errors, but worth checking log details.

TODAY'S CALENDAR

Today (Sunday 3/29): No events scheduled.

Tomorrow (Monday 3/30): Luke Siring Break (all day — Family)

Rest of the week:

- **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 ■■ Back-to-back — 30 min gap
- **Wed 4/1:** Passover | Cancel SalesNavigator PRO 9:30–10:30 AM
- **Fri 4/3:** Good Friday
- **Sun 4/5:** Easter — YCS CLOSED

DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	■ LIVE	2026-03-29 06:01	Daily + Mon rebuild	Current
Inventory Dashboard	■ LIVE	2026-03-28 06:11	Daily	24h old — acceptable
Command Console	■ LIVE	2026-03-28 14:04	Daily	Current
CEO Dashboard	■ LIVE	—	Daily	Noted stale 3/25 — verify
Summit Report	■ LIVE	—	Weekly	Rebuilt 3/27
Guest Dashboard	■ LIVE	—	Weekly	Rebuilt 3/27
P&L Flow	■ LIVE	—	Monthly	Last major update 3/23
Reach Dashboard	■ LIVE	—	Weekly	—
Agent Status	■ LIVE	—	Daily	—
Slack Archive	■ LIVE	—	Every 2h	Watcher synced 6x yesterday
Support Staff	■ LIVE	—	Daily	—
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator TBD
Associate Dashboard	■ NEEDS CREATION	—	TBD	Generator TBD
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator TBD

DEPARTMENT: INVENTORY

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

- **Jane products under review** — Philip and Stacy agreed to reduce the line by clearing slow movers (per 1:1 notes 3/22–3/26)
- Inventory dashboard is current (554KB, updated 3/28)
- Inventory_List.xls routed successfully this morning — data will refresh on next ingest
- No pipeline alerts or staleness issues on inventory fact tables

DEPARTMENT: EDUCATION

Education Program Leader: Kaeleigh Tran

■ Kaeleigh's Master 2026 Class Calendar (posted Mar 11 to #education @channel):

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 Product Knowledge 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 (5 ♥■ reactions)
Aug–Dec	Monthly classes continuing through December	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 QR code (Mar 9).

Education Dashboard: Still needs creation — generator TBD.

DEPARTMENT: ASSOCIATE PROGRAM

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

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

Key notes:

- Teigan had support staff hours (starting Mar 3) at \$16.75/hr — separate from associate wage/commission calc (per payroll directive)
- Ali had her first 1:1 coaching session with Kaeleigh — reviewed 50% rebooking rate goal (per Kaeleigh's Mar 19 email)
- Next APL briefing: Tomorrow (Monday)

DEPARTMENT: MANAGER 1:1

1:1 Cadence Status:

Team Member	Last 1:1	Days Ago	Status
Stacy	2026-03-26	3	■ Current
Chelsea	2026-03-07	22	■■ OVERDUE
Erin	2026-03-07	22	■■ OVERDUE
Kaeleigh	2026-03-07	22	■■ OVERDUE

Team Member	Last 1:1	Days Ago	Status
Karen	2026-03-07	22	■■ OVERDUE
Kathryn	2026-03-07	22	■■ OVERDUE

Recent Stacy 1:1 themes (3/22–3/26): Jane product line reduction, clearing slow movers, Feb performance review (worst month in 4 years — 386 lost hours, \$24K revenue impact).

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

Kaeleigh sent coaching session updates:

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

Other Kaeleigh emails (Mar 18):

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

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

CUSTOMER FEEDBACK

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

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.

EMAIL HIGHLIGHTS

44 emails in last 24h (17 unread). All 17 unread are Phorest/Looker automated reports — no action-required emails flagged. Accounts: LuganoRidge (38), Reach (6).

IMESSAGE

3 messages in 48h from +1(303)720-5995 — content appears to be images/attachments only (no readable text). No business-relevant messages detected.

PHOREST DATA

All 10 expected daily reports routed successfully this morning at 06:00:

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

Note: Multiple duplicate/stacked copies of Mar 28 ZIP files were also routed (backlog from watcher cycles) — 39 total files processed.

PAYROLL SNAPSHOT

No payroll report today (runs Mondays).

Key standing items from #ycs-payroll-review:

- **Megan King terminated** PP6 (3/7) — 33.6h PTO payout + \$169.96 expense chargeback processed
 - **Teigan support hours** at \$16.75/hr (starting 3/3) — separate from associate wage calc
 - **Erin Frost** worked Thu 3/12 support hours at \$16.75/hr — separate from wage calc
 - **Retail commission** reminder: run prior month full retail payout
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PAYROLL CALENDAR

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

■ **PP7 ends TODAY** — 0 working days remaining

➡■ **PP8 begins tomorrow** (March 30) — this is when Deana Faust's Level 3 promotion should take effect (April 1)

Pending items in #ycs-payroll-review will be processed at tomorrow's 6 AM run.

DAYTIME WATCHER

March 28 activity — 7 cycles, all Slack-related:

- 6 Slack archive syncs (08:00, 10:00, 12:00, 2:00, 4:00, 6:00 PM)
 - Slack Archive Dashboard updated 3x (10:06, 12:06, 2:04 PM)
 - No new file drops detected (Phorest, vendor invoices, Reach data)
-

AGENT STATUS

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

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

Pipeline alerts: None. Data staleness: All fact tables current. Phorest router warnings likely from duplicate Mar 28 ZIP file stacking — not blocking.

Sunday agents scheduled: System Learning agent runs today (self-improvement, pattern recognition).

Generated 2026-03-29 06:00 | Next briefing: Monday 2026-03-30 (full Monday pipeline — inventory, payroll, associate program)