

# CEO Morning Briefing

Monday, 2026-03-30

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**Monday, March 30, 2026 | Carrera Crest Holdings**

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## TODAY'S ACTIONS

### ■ Urgent (Today)

- Deana Faust Level 3 promotion — PP8 starts TODAY (Apr 1). Update Phorest service level + Paychex payroll rate. Tag Kaeleigh to confirm. (Payroll Review)
- SimpliSafe sensor alert — RoofTop Entry sensor not responding at 92nd Ave (92H) since 1:15 AM. Check/reset remotely or dispatch. (iMessage/Email)
- PP7 payroll due for processing — PP7 closed yesterday, biweekly payroll auto-triggered. Verify processing completed. (Payroll Calendar)
- Vendor Orders data stale 16 business days — vendor\_orders.csv last updated 3/6. Check Salon Centric/Kerastase email delivery. (Pipeline Alert)
- COO Agent failed to run — reported permissions issue reading \_Agent\_Runner directory. Investigate and fix before tomorrow's run. (COO Scan)
- Feb payroll at 76% of revenue — above 75% threshold. Review staffing mix and hours. (P&L; Snapshot)

### ■ This Week

- Schedule overdue 1:1s — Chelsea, Erin, Kaeleigh, Karen, Kathryn all 23 days overdue (Zoom/1:1 Data)
- Tomorrow 8:30 AM: SS Meeting IN PERSON + 10 AM Redken Black Level Luncheon @ EDGE Restaurant, Denver (Calendar)
- Cancel SalesNavigator PRO — calendar reminder Wed 4/1 (Calendar)
- Review Kaeleigh's 1:1 coaching notes from 3/19 — Ali's first session, rebook goal tracking (Kaeleigh Email)
- Jane product line reduction — agreed with Stacy to clear slow movers (1:1 Notes)

### ■ Queued (Pending CEO TO DO)

- Check on insurance for 92H
- Draft TEN Salon purchase agreement email to Erin
- Fix 92H issues and establish monthly emails
- Go to DORA — 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

- 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

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

PP8 starts April 1, 2026 — this needs to be done before then.

Confirmed: Dec + Jan + Feb all qualified (\$406/day avg vs \$374 threshold ■), Retail \$42/day hit ■, Kaeleigh confirmed via Slack (Mar 17).

### Two things needed before PP8:

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

**Completed items:** TEN lease proposal ■, Bello Haven email ■, Reach owner payments ■, CCH Automation template ■, Text MM ■, Boulevard access ■, Chase accounts ■, Deposit cash ■, Parking ticket ■, Operating Agreements ■

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## FIRES

■■ COO Daily Scan did not execute — agent reported permissions error accessing \_Agent\_Runner directory. No COO anomaly detection ran today. Needs immediate fix.

■ SimpliSafe sensor failure — Entry Sensor "RoofTop Entry" not responding at 6350 W 92nd Ave (92H) since 1:15 AM. Received via both iMessage and email.

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## WARNINGS

■■ Vendor Orders data 16 days stale — vendor\_orders.csv last data date 3/6, expected 3/27. Inventory cost enrichment pipeline is running on outdated COGS data.

■■ Feb 2026 payroll at 76% of revenue — above 75% threshold. Feb was worst month in 4 years (386 hours lost to sick/PTO/training, \$24K revenue gap per Zoom summaries).

■ ■ 5 staff 1:1s overdue — Chelsea, Erin, Kaeleigh, Karen, Kathryn all last met 3/7 (23 days ago). Only Stacy is current (3/26).

■ ■ Phorest router had 3 warnings and runner had 4 warnings — no errors, but review logs for data routing issues.

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## TODAY'S CALENDAR

**Today (Monday 3/30):** No events scheduled.

**Tomorrow (Tuesday 3/31):**

- ■ 8:30–9:30 AM: **SS Meeting — IN PERSON** (60 min)
- ■ 10:00 AM–1:00 PM: **Redken Black Level Luncheon** @ EDGE Restaurant, 1111 14th St, Denver (180 min)
- ■ ■ Only 30 min gap between meetings

**Rest of Week:**

- Wed 4/1: Cancel SalesNavigator PRO (9:30 AM) | Passover
  - Fri 4/3: Good Friday
  - Sun 4/5: Easter — **Salon CLOSED**
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## DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	■ LIVE	2026-03-30 06:03	Daily + Mon rebuild	Current
Inventory Dashboard	■ LIVE	2026-03-29 07:23	Daily	23h old — will refresh today
Command Console	■ LIVE	2026-03-29 20:39	Daily	Current
CEO Dashboard	■ LIVE	~3/25	Weekly	Check freshness
Summit Report	■ LIVE	~3/27	Weekly	Check freshness
P&L Flow	■ LIVE	3/29	Monthly	Current
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator not built
Associate Dashboard	■ NEEDS CREATION	—	TBD	Generator not built
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator not built

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## DEPARTMENT: INVENTORY

- No inventory report today (runs Mondays — will generate later today).
- **Vendor Orders stale** — vendor\_orders.csv last updated 3/6 (16 business days behind). Cost enrichment for Redken/Pureology/Pulp Riot products running on outdated data. 296 products still unresolved for cost.
- Inventory dashboard live (576KB, updated 3/29). 1,384 product rows tracked.

- Jane product line under review — Stacy and Philip agreed to reduce by clearing slow movers (from 1:1 discussions last week).
- Phorest Inventory List routed today (XLS + PDF). Will be ingested by Monday pipeline.

## DEPARTMENT: EDUCATION

**Education Program Leader: Kaeleigh Tran**

### Upcoming Classes:

- **Apr 8, 2–4pm:** Summit Tracking/Planning for Success w/ Chelsea (mandatory associates/L1)
- **Apr 13, 10am–4pm:** Curl Class w/ Lindsey Olson (mandatory in-salon)
- **May 6, 2–4pm:** Shades EQ PK w/ Jenisa
- **Jun 3, 2–4pm:** Kerastase Product Knowledge — **MANDATORY FOR EVERYONE**
- **Jul 13, 10am–4pm:** Blonding Class w/ Sam Klaver (5 ❤️👍 reactions)

### Recent Activity:

- Mar 11: Kaeleigh posted full 2026 education calendar to #education (@channel)
- Mar 9: Blonding class announcement (Sam Klaver, Jul 13)
- Mar 9: Shared Kerastase 2026 virtual education schedule (free, 90 min sessions)
- Completed: Bello Haven Extension (Mar 2, 11 stylists), Kerastase Refresher (Feb 24), Salon Service Class (Feb 16)

**Kaeleigh Emails (3/18):** Replied to Kerastase Virtual Education Calendar and Kate Drinkwater business-growth event invitations.

Education Dashboard: 🟩 Not yet built.

## DEPARTMENT: ASSOCIATE PROGRAM

**Associate Program Leader: Chelsea Badjar** (Level 6 Stylist)

No APL briefing today — runs Mondays (will generate later today). Active associates: Alexis White, Ali Guerrero, Teigan Maniatis. Next monthly class: Apr 8 (Summit Tracking w/ Chelsea). Chelsea's 1:1 is 23 days overdue.

## DEPARTMENT: MANAGER 1:1

### 1:1 Cadence Status:

Team Member	Last 1:1	Status
Stacy	Mar 26 (4d)	🟩 Current
Chelsea	Mar 7 (23d)	🟥 OVERDUE
Erin	Mar 7 (23d)	🟥 OVERDUE
Kaeleigh	Mar 7 (23d)	🟥 OVERDUE

Team Member	Last 1:1	Status
Karen	Mar 7 (23d)	■■ OVERDUE
Kathryn	Mar 7 (23d)	■■ OVERDUE

**Recent 1:1 Topics (Stacy, 3/25–3/26):** Jane product line performance — agreed to reduce/clear slow movers. Feb performance review: worst month in 4 years, 386 hours lost (sick/PTO/training), \$24K revenue gap.

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

Kaeleigh sent coaching session updates:

- **Ali:** First one-on-one. Reviewed primary goal of 50% rebooking rate. Discussed planning and progress tracking. Addressed initial questions.
- \*(Email was truncated — review full email for additional associate updates)\*

No 1:1 notes from Kaeleigh this week (last was 3/19, 11 days ago).

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## CUSTOMER FEEDBACK

No customer emails in the last 24 hours from [contact@yachtclubsalon.com](mailto:contact@yachtclubsalon.com).

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## TAYLOR'S EMAILS

No emails from Taylor in the last 3 days. No briefing replies received.

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## EMAIL HIGHLIGHTS

**38 emails (17 unread)** — LuganoRidge: 34, Reach: 4

- **Phorest Week in Review:** 202 client visits (+35), \$127 avg bill (+\$16), \$25K weekly revenue
  - **SimpliSafe Error Alert:** RoofTop Entry sensor not responding at 92nd Ave — 1:15 AM (■ see Fires)
  - **12 Phorest data emails** — all routed successfully (tips, performance, appointments, inventory, GC, utilisation, clock in/out, sales)
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## IMESSAGE

- **SimpliSafe (82539):** Sensor error — RoofTop Entry at 92nd Ave, 1:15 AM (duplicate of email alert)
  - **+1(303)720-5995:** Personal message (clock/military time) — not business-relevant
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## PHOREST DATA

**All 10 expected report types routed successfully** at 06:02 today:

- 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) ■
- Swing Aware: Staff Tips, Performance Detail, Future Appointments 90 Days ■

Plus backlog files from 3/27–3/29 also routed (multiple accumulated ZIP files processed).

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## PAYROLL SNAPSHOT

No payroll report today (runs Mondays — will generate later today).

### Key flags from P&L; data:

- Feb 2026 payroll at **76% of revenue** — above 75% threshold
  - Feb net loss of (\$4,273) — driven by 386 lost hours
  - Mar revenue \$108,697 MTD — trending positive vs Feb
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## PAYROLL CALENDAR

**Pay Period 8** (2026-03-30 → 2026-04-12) — April 2026, Period 1 of 2

■ **PP8 started today** — Day 1/14 | 9 working days remaining

■ PP7 closed yesterday — biweekly payroll auto-triggered

■ YCS Payroll Review has pending items for processing

■■ **CRITICAL:** Deana Faust Level 3 promotion must be in Phorest + Paychex before PP8 processing. Effective date: April 1.

### Active payroll directives:

- Megan King termination processed (PP6) — 33.6h PTO payout, -\$169.96 chargeback
  - Teigan support staff hours at \$16.75/hr (separate from associate wage)
  - Erin Frost support hours 3/12 at \$16.75/hr
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## DAYTIME WATCHER

Watcher idle — no intra-day changes detected.

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## AGENT STATUS

**Pipeline: 15 agents ran, 0 errors**

Agent	Status	Notes
Briefing Compiler	■	Clean run
Calendar Export	■	13 events loaded
COO Daily	■■	Ran but failed to access data — permissions issue
Phorest Router	■■	3 warnings (review log)
Runner Morning	■■	4 warnings (review log)
Mail Export	■	38 emails processed
Slack Sync	■	All channels synced
Ingest Daily	■	Clean run
Warehouse Health	■	All critical tables current
All others	■	No issues

■ **Pipeline Alert:** `vendor_orders.csv` — 16 business days stale (last: 3/6, expected: 3/27). Inventory cost enrichment running on outdated COGS. Check Salon Centric/Kerastase email delivery and router logs.

**Monday agents pending:** YCS Inventory, Associate Program, Marketing, Payroll (full rebuild), Dashboard refresh — scheduled for 7 AM run.