



CARRERA CREST HOLDINGS

CEO Morning Briefing

Wednesday, 2026-03-11

Carrera Crest Holdings — Wednesday, March 11, 2026

FIRES (FROM COO SCAN — ITEMS NEEDING IMMEDIATE ACTION TODAY)

1. March Mask Promo: 2 of 3 Featured Products Are Backordered

Nutritive Masquintense and Genesis Masque are backordered. Only Chronologiste is available (1x 500ML professional, vendor gift). Chronologiste is selling (2 units, \$126 retail MTD — #6 on leaderboard), but promo is at 33% product availability.

→ **Action:** Substitute alternative masks, narrow to Chronologiste-only, or confirm backorder ETAs and communicate to team TODAY.

2. Breanna Harte — Zero Revenue MTD Despite 54 March Appointments

54 appointments booked (\$3,882 value) but \$0 in staff_performance for week 1. Either she hasn't worked any shifts or there's a Phorest data gap.

→ **Action:** Confirm Breanna's schedule status TODAY.

WARNINGS (MONITOR THIS WEEK)

- **Tashina Miranda** — No performance revenue week 1, only 12 appointments booked all March (\$718). Two months declining. 30-day decision window approaching.
 - **Ali Guerrero** — Absent from week 1 performance. Only 8 March appointments (\$599). Needs more floor time.
 - **Drake Rosberg** — 55% rebook rate (salon avg 83%). Strong revenue/RTS but churning clients.
 - **Deana Faust** — \$44.07 Rev/Hr (lowest), 55% utilization (lowest), 64% rebook, 8% RTS. Multiple underperformance signals.
 - **Jane Iredale** — -3 units (returns) on Mar 2. Still 28.5% of inventory, 21% sell-through. Capital concentration persists.
 - **GLOBAL_CONFIG stale** — Megan King still listed as active (terminated 3/7). Support Staff bonus list needs update.
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TODAY'S CALENDAR

| Time | Event | Duration | Notes |
|---------------------|--------------------------------|----------|---|
| 9:00 AM – 2:00 PM | **Summit Team Pods** | 5 hr | ■■ Britney Pfister texted — no one joined yet. Confirm link/status. |
| 11:00 AM – 12:00 PM | **Phil + Rob + Mak** | 1 hr | ■■ CONFLICTS with Summit Pods |
| 11:00 AM – 1:30 PM | **Dryer to YCS** | 2.5 hr | ■■ CONFLICTS with Summit Pods & Phil+Rob+Mak |
| 1:00 PM – 1:30 PM | **TEN Salon Lease Discussion** | 30 min | Microsoft Teams — Jim Bickford wants to discuss today (see email) |

■■ **3-way scheduling conflict 11:00 AM–12:00 PM** — Summit Pods, Phil+Rob+Mak, and Dryer delivery all overlap. Dryer may not require your presence the full window.

Tomorrow Preview: 7 AM Applewood Furnace checkup | 8:30 AM Nicole YCS Interview (Front Desk) | 9 AM–2 PM SSBC Virtual Guest Service Coaching

Rest of Week:

- **Fri 3/13:** Coffee w/ Jan Glowup (10a) · Axon Interview (12:30p) · Meeting @ Tap & Burger Westminster (3p)
- **Sat 3/14:** Night of Dreams Gala @ Chateaux at Fox Meadows (6–8p) — Grant a Dream auction link received via iMessage
- **Mon 3/16:** Modern Practice Growth Summit virtual (3–6:45p)
- **Tue 3/17:** Bi-monthly company TEN SALON (all day)

DASHBOARD STATUS

| Dashboard | Status | Last Updated | Schedule | Notes |
|-----------------------------|---------------|----------------------------|-----------------------------|---------------------------|
| Inventory Dashboard | ■ LIVE | 2026-03-11 10:20 | Daily (morning) | Current |
| Web Station Index | ■ LIVE | 2026-03-11 10:20 | Daily (morning) | Current |
| Payroll Dashboard | ■■ STALE | 2026-03-09 01:17 (58h ago) | Daily AM + Mon full rebuild | Needs rebuild — 58h stale |
| Education Dashboard | ■ NOT CREATED | — | TBD | Generator & schedule TBD |
| Associate Program Dashboard | ■ NOT CREATED | — | TBD | Generator & schedule TBD |
| Marketing Dashboard | ■ NOT CREATED | — | TBD | Generator & schedule TBD |

DEPARTMENT: INVENTORY

- **March Mask Promo at 33% availability** — Masquintense & Genesis Masque backordered. Only Chronologiste in stock. Promo pivot needed today.
- **Jane Iredale concentration risk** — 28.5% of total inventory value, only 21% sell-through. -3 units returned Mar 2. Capital tied up.
- **Inventory value stable at \$30,326.** Fresh data routed today: low inventory alerts, under/overstock, movement & sell-through reports all updated at 10:00 AM.
- **No Monday inventory report this week** — next full report runs Monday 3/16.
- **Watcher routed 20+ inventory data files** on 3/10 (6 PM) and 3/11 (10 AM) including low_inventory_alerts and under_overstock CSVs. Available for review.

DEPARTMENT: EDUCATION

- **Program Leader:** Chelsea Badjar (Level 6 Stylist)
- **Slack #education:** No export available (scanner disabled)
- **Dashboard:** Not yet created — generator and schedule TBD
- **Data sources being identified:** Slack #education, Phorest training records, CEU tracking, vendor education emails
- **Kerastase email received:** New Launches + Friends and Family Event — potential education/vendor tie-in
- **Needed:** Enable Slack #education export, define education KPIs, build dashboard generator

DEPARTMENT: ASSOCIATE PROGRAM

- **No APL briefing today** — runs Mondays. Last available: check Monday 3/9 output.
- **Dashboard:** Not yet created — generator and schedule TBD
- **Needed:** Associate roster (active vs graduated), override tracking, program leader assignments, dashboard build

DEPARTMENT: MANAGER 1:1

- **1:1 data could not be loaded** for today's briefing.
- **Status unknown** — unable to report on most recent COO meetings, Manager meetings, or Zoom summaries.
- **Action needed:** Troubleshoot 1:1 data source access. Determine which months have source data generated.

CUSTOMER FEEDBACK (FROM OUTLOOK CONTACT@YACHTCLUBSALON.COM)

No emails found in the last 24 hours from contact@yachtclubsalon.com. No complaints, appointment changes, or bridal requests to report.

TAYLOR'S EMAILS (MESSAGES FROM TAYLOR REQUIRING PHILIP'S RESPONSE)

No emails from Taylor in the last 3 days. Feedback loop idle — no action needed.

EMAIL HIGHLIGHTS (KEY UNREAD EMAILS WORTH NOTING)

- ■ **Matthew Morris** — "purchase" — He's selling his salon, closing within weeks. Wants maximum discretion. **Respond today.**
 - ■ **Jim Bickford (LawHedge)** — RE: Devin Lease DTC Amendment 2 — Wants a call today to discuss lease and overall project status. **Ties to 1:00 PM TEN Salon Lease Discussion.**
 - ■■ **Jennifer Rivera (Ruby Capital)** — RE: 100K Online Checkout — Checking if you completed the online checkout, hasn't received confirmation. **Needs response.**
 - ■■ **Paychex (Lauren Lomax)** — Transition from Mineral to SixFifty platform announced. Review implications for HR compliance tooling.
 - ■ **Westminster Utility Bill** — Due Mar 31 for 92nd & Harlan LLC. Route to AP.
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IMESSAGE (BUSINESS-RELEVANT MESSAGES)

- ■■ **Brittney Pfister (Summit)** [9:13 AM] — On the call for team's virtual session but no one has joined. Confirm if Summit Team Pods is still on. **Respond ASAP.**
 - **[9:15 AM] +17203638777** — Asking if it's the same Zoom link as last time for Summit pods. **Confirm link.**
 - **SimpliSafe** [8:30 AM] — Sensor error: Back Door entry sensor not responding at 6350 W 92nd Ave. System was disarmed at 7:58 AM by Keypad Master PIN.
 - **Grant a Dream Foundation** [9:15 AM] — Personal auction bidding link received for Night of Dreams Gala (Saturday).
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PHOREST DATA (NEW REPORTS ROUTED)

Phorest router processed data at 10:42 AM today. Reports routed:

- **Staff Tips** (Daily 3/11) → Employees folder
 - **Sales Transactions** (Daily 3/11) → daily_sales folder
 - **Staff Performance Detail** (Last 7 Days) → Employees folder
 - **Inventory Last 7 Days** → Inventory/Reports
 - **Retail Sales Trend** → Inventory/Reports
 - **Service Sales Trends** → Sales Data/Trends
 - **Future Appointments 90 Days** → Employees/Appointments (SNAPSHOT mode)
 - Multiple backlog files from 3/8–3/10 also routed and caught up.
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PAYROLL SNAPSHOT

No payroll report today — runs Mondays. Payroll dashboard is 58h stale and needs rebuild.

TODAY'S ACTIONS (CONSOLIDATED CHECKLIST)

- [] **URGENT:** Respond to Summit Pods team — Brittney + other contact waiting, no one has joined the call
 - [] Decide on mask promo pivot (2/3 products backordered) — communicate to team today
 - [] Check Breanna Harte's March schedule (\$0 revenue vs 54 appointments)
 - [] Reply to Matthew Morris re: salon sale — time-sensitive, discretion required
 - [] Call Jim Bickford before 1:00 PM TEN Salon Lease Discussion (he requested a call today)
 - [] Reply to Jennifer Rivera re: 100K online checkout confirmation
 - [] Update GLOBAL_CONFIG — remove Megan King (terminated 3/7), update Support Staff bonus list
 - [] Flag Drake Rosberg & Deana Faust for Kaeleigh's coaching agenda
 - [] Route Westminster utility bill to AP (due Mar 31)
 - [] Investigate payroll dashboard staleness (58h) — trigger rebuild
 - [] Grant `_Agent_Runner/inbox/` read permissions for future autonomous scans
 - [] Monitor Tashina Miranda — decision if week 2 shows no improvement
 - [] Prep for tomorrow: Nicole YCS Interview (8:30 AM) — review candidate info
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DAYTIME WATCHER (INTRA-DAY AUTO-ACTIONS)

March 10 (yesterday):

- 12:07 AM: Routed 9 unprocessed Phorest ZIP files
- 6:00 PM: Generated 49 new data files across Sales Trends, Inventory Reports, Employee Appointments, Staff Tips, and Staff Performance

March 11 (today, pre-briefing):

- 10:00 AM: Generated 49 new data files — full refresh of Sales Trends, Inventory Reports, Employee Appointments, Staff Tips, and Staff Performance for 3/11
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AGENT STATUS (SYSTEM HEALTH)

| Agent | Errors | Warnings | Status |
|-------------------|--------|----------|------------------------|
| Runner Morning | 4 | 4 | ■■ Investigate |
| COO Daily Scan | 2 | 1 | ■■ Inbox access denied |
| Briefing Compiler | 2 | 0 | ■■ Minor errors |
| Outlook Export | 0 | 3 | ■■ Warnings |
| Calendar Export | 0 | 0 | ■ |
| iMessage Export | 0 | 0 | ■ |
| Mail Export | 0 | 0 | ■ |
| Phorest Router | 0 | 0 | ■ |
| Watcher | 0 | 0 | ■ |

| Agent | Errors | Warnings | Status |
|--------------|--------|----------|--------|
| Cron Watcher | 0 | 0 | ■ |
| Slack Sync | 0 | 0 | ■ |
| NAS Sync | 0 | 0 | ■ |
| All others | 0 | 0 | ■ |

Key issue: COO scan could not access `_Agent_Runner/inbox/` — grant read permissions to enable full autonomous scanning.

MTD Snapshot: \$24,935 revenue | 16.4% RTS | 83% rebook | 103% utilization | Today's book: 55 appts / \$3,493 (strongest day this week)

Bright spot: Teigan Maniatis — \$734 week 1 vs \$1,129 all of February. On pace to crush breakeven. 19% RTS.