

CEO Morning Briefing

Sunday, 2026-03-15

Sunday, March 15, 2026 | Carrera Crest Holdings

CEO TO DO

CEO TO DO note not found in Apple Notes (sync failed after 3 retries). Check Apple Notes manually or verify note title matches "CEO TO DO" exactly.

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

1. GLOBAL_CONFIG STALE — Megan King still listed as active. Terminated 03-07-2026 but remains in EMPLOYEE ROSTER and SUPPORT STAFF BONUS THRESHOLDS. Affects payroll calculations, bonus eligibility, and all downstream agents. **Overdue — fix today.**

2. Critical inventory stockouts — high-velocity products at zero:

Product	Depletion Rate	Urgency
Pureology Color Fanatic 21 Spray	0.43/day	HIGHEST
Redken ABC Hair Bandage Balm	0.37/day	HIGH
Redken ABC Shampoo Sm	0.23/day	HIGH
Mimosa Weekday (alcohol)	0.80/day	HIGH — revenue generator
Surface Awaken Therapeutic (shampoo + cond)	0.10/day each	MEDIUM

Lost sales every day these stay at zero. Taylor needs this Monday.

WARNINGS (MONITOR THIS WEEK)

- March Mask Promo — very low adoption.** Only 2 Chronologiste Masque add-ons in 4 days (Kathryn 3/12, Stacy 3/13). Zero from other stylists. Nutritive/Genesis backordered — Chronologiste is the only option. Push at huddle or accept supply constraint.
- RTS% at 9.6%** — well below 17% goal and 15% support staff bonus threshold. Retail is weak.
- Jane Iredale at 28.5% of inventory value** — exceeds 25% concentration threshold. 21% sell-through. \$8,681 tied up in zero-velocity testers.

- **Inventory shrinkage: \$1,158 negative** — Mimosa Weekday (-151 units), Tiamo Prosecco (-55). Needs reconciliation.
- **Tashina Miranda** — **tracking better** but still low. \$433 service in 2 days (Mar 10-11). Improvement from Feb (\$355 entire month). One \$58 refund. Keep watching.
- **Ali Guerrero** — **zero transactions** Mar 10-13. Associate-track measuring mentorship, but is she getting floor time?

TODAY'S CALENDAR

Today (Sunday 3/15): No events scheduled.

Tomorrow (Monday 3/16):

- 12:00–12:30 PM: Matthew Morris X BLVD (30 min)
- 3:00–6:45 PM: The Modern Practice Growth Summit — virtual (225 min)

Rest of week:

- **Tue 3/17:** St. Patrick's Day | Bi-monthly TEN SALON company day | 11:45 AM TEN Salon Med Doc (2h)
- **Thu 3/19:** 9:30 PM Pick up Luke & Penelope
- **Fri 3/20:** Eid al-Fitr | 9:00 AM "New Event" (1h)
- **Sat 3/21:** 12:30–5:00 PM Brooklyn (■■ duplicate entry) | 2:30 PM Wilson Groom @ 1222 E 6th Ave Denver (conflict with Brooklyn)
- **Sun 3/22:** 10:00 AM St. Baldricks (4h) + 10:30 AM St. Baldricks Event (2h) — overlapping/related entries

■■ **Sat 3/21 conflict:** Wilson Groom at 2:30 PM overlaps with Brooklyn 12:30–5:00 PM.

DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	■ LIVE	2026-03-15 07:29	Daily AM + Mon full rebuild	Current
Inventory Dashboard	■ LIVE	2026-03-15 06:03	Daily AM	Current
Web Station Index	■ LIVE	2026-03-15 07:41	Daily AM	Current
Education Dashboard	■ NEEDS CREATION	—	TBD	Generator not built
Associate Program Dashboard	■ NEEDS CREATION	—	TBD	Generator not built
Marketing Dashboard	■ NEEDS CREATION	—	TBD	Generator not built

DEPARTMENT: INVENTORY

- **5 critical stockouts** (see FIRES above) — order Monday. Color Fanatic 21 Spray is highest urgency.
- **Shrinkage: \$1,158 negative** — concentrated in alcohol (Mimosa -151 units, Prosecco -55). Reconciliation needed.

- **Jane Iredale: 28.5% of inventory value** (\$8,681 in zero-velocity testers) — exceeds 25% threshold, 21% sell-through.
- **RTS% at 9.6%** — 4-day retail-to-service ratio far below 15% bonus threshold and 17% goal.
- **Mask promo underperforming** — 2 add-ons in 4 days. Supply-constrained (only Chronologiste available).
- No standalone inventory report today (runs Mondays). Latest inventory snapshot routed via Phorest (PDF + XLS).

DEPARTMENT: EDUCATION

Leader: Kaeleigh Tran (Education & Coaching)

Major update (Mar 11): Kaeleigh posted the complete **2026 Education Calendar** to #education with @channel. Key dates:

Date	Class	Instructor	Audience
Apr 8, 2-4pm	Summit Tracking/Planning	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 PK 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
Aug 5, 2-4pm	Vivids	Becca	Associates/L1

- Kaeleigh shared Kerastase 2026 free virtual education schedule (90-min sessions, QR registration).
- Recent completions: Bello Haven Extension Class (3/2, 11 attended), Kerastase Refresher w/ Nicole (2/24), Exceptional Salon Service (2/16).
- ■■ **Kaeleigh PTO requests pending your approval:** Sat Apr 25 and Sat Aug 1 (via Paychex).
- Education Dashboard: **not yet built** — data sources identified (Slack, Phorest, CEU tracking).

DEPARTMENT: ASSOCIATE PROGRAM

Leader: Chelsea Badjar (Level 6 Stylist)

No Associate Program briefing today (runs Mondays). Chelsea posted \$1,442 in service revenue over 4 days (Mar 10-13), averaging \$361/day. Ali Guerrero (associate track) had zero transactions Mar 10-13 — verify she's getting floor time alongside mentorship hours. Associate Program Dashboard: **not yet built**.

DEPARTMENT: MANAGER 1:1

One-on-one data could not be loaded this morning. Unable to report on recent COO or manager meeting notes, Zoom summaries, or which months have source data generated. **Flag: investigate 1:1 data load failure.**

CUSTOMER FEEDBACK (FROM OUTLOOK CONTACT@YACHTCLUBSALON.COM)

No customer emails found in the last 24 hours. Outlook export ran successfully — just no inbound messages.

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

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 (KEY UNREAD EMAILS WORTH NOTING)

- **Paychex — Time off requests (2):** Kaeleigh Tran requesting PTO for Sat Apr 25 and Sat Aug 1 (6 hours each). **Action needed: approve/deny.**
- **Paychex — Cancel time off:** Stacy Salee wants to cancel PTO for Wed May 13. **Action needed: approve/deny.**
- **Custom Contractors Services — Invoice reminder:** Invoice #6889, \$347.50 due to Yacht Club Salon. **Payment overdue.**
- **Looker reports (2):** Staff Tips DAILY and Sales Transactions DAILY — auto-scheduled, routed to data folders.
- **SalonCentric:** Survey about recent Business Partner visit — low priority.

Skipped: Culligan promo, SimpliSafe armed alert, Shu Uemura marketing, Nextdoor news.

IMESSAGE (BUSINESS-RELEVANT MESSAGES)

- **+16023915928 (6:02 AM today):** Urgent payment request — asking Philip to send Andy (and possibly others) a partial payment today (1/4, 1/2, any amount). Also requesting updated Julie F. Maricopa invoice. **■■ Needs same-day response.**
 - **+16023915928 (6:30 AM today):** "THANK YOU!!!" — follow-up to above.
 - **SimpliSafe:** System disarmed at 6350 W 92nd Ave, 7:12 AM (routine).
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PHOREST DATA (NEW REPORTS ROUTED)

Phorest router ran at 07:29 — **16 files routed:**

- Sales Transactions DAILY → `_Agent_Runner/data/daily_sales` (multiple date variants including 3/14 and 3/15)
 - Staff Tips DAILY → `YCS COO Files/Data/Employees`
 - Inventory List (PDF + XLS) → `Inventory On Hand` (snapshot mode)
 - Staff Clock In-Out (PDF + XLS) → `Employees` (append mode)
 - ■■ 4 warnings in `phorest_router` log — may indicate duplicate file handling.
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PAYROLL SNAPSHOT

No payroll report today (runs Mondays). Key financial flags from P&L;:

- **Feb 2026 payroll at 76% of revenue** — above 75% red line, well above 65% target.
 - Feb 2026 net loss: (\$4,273). YTD net loss: (\$18,422).
 - March MTD revenue \$60,398 — pacing ~\$121K/mo (improvement over Feb's \$93.9K).
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TODAY'S ACTIONS (CONSOLIDATED CHECKLIST)

- [] **URGENT: Remove Megan King from GLOBAL_CONFIG** — terminated 03-07, still active
 - [] **URGENT: Respond to iMessage re: Andy payment + Julie F. Maricopa invoice** — same-day
 - [] **Approve/deny Kaeleigh Tran PTO** (Apr 25, Aug 1) and **Stacy Salee PTO cancellation** (May 13) in Paychex
 - [] **Pay Custom Contractors invoice #6889** — \$347.50 overdue
 - [] **Prepare Monday restock order:** Color Fanatic 21 Spray, Redken ABC products, Mimosa Weekday
 - [] **Reconcile alcohol shrinkage** — Mimosa Weekday (-151 units), Prosecco (-55)
 - [] **Push mask promo** at next huddle or acknowledge supply constraint
 - [] **Verify Ali Guerrero scheduling** — zero transactions in 4 days
 - [] **Confirm Teigan Maniatis dual-role payroll** — \$17.25/hr support vs \$15.16/hr stylist
 - [] **Fix CEO TO DO note** — Apple Notes sync failed; verify note title
 - [] **Fix `_Agent_Runner/inbox/` permissions** — COO scan can't access email routing folder
 - [] **Investigate 1:1 data load failure**
 - [] **Review Kaeleigh's 2026 Education Calendar** — full year posted to #education 3/11
 - [] **Config updates needed:** (1) Remove Megan King, (2) Stacy Salee L6/55% when PP13 effective, (3) Teigan dual-role config
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DAYTIME WATCHER (INTRA-DAY AUTO-ACTIONS — 2026-03-14)

Watcher ran 6 Slack archive syncs (08:00, 10:00, 12:00, 14:00, 16:00, 18:00). No other intra-day actions detected — no new file routing, no dashboard rebuilds triggered outside of morning schedule.

AGENT STATUS (SYSTEM HEALTH)

Agent/Log	Errors	Warnings	Status
Briefing Compiler	2	0	■■ CEO TO DO note sync failed
COO Daily Scan	1	1	■■ Inbox permissions error
Runner Morning	3	6	■■ Investigate
Phorest Router	0	4	■■ Duplicate file warnings
Calendar Export	0	0	■
Mail Export	0	0	■
Outlook Export	0	0	■
iMessage Export	0	0	■
Slack Sync	0	0	■
Slack Daily Inventory	0	0	■
Notes Sync/Writeback	0	0	■
NAS Sync	0	0	■
Zoom Router	0	0	■
Vendor Learning	0	0	■

Key issues: (1) CEO TO DO note not found — sync failure, (2) `_Agent_Runner/inbox/` outside working directory permissions, (3) Runner morning log has 3 errors/6 warnings — needs review.