



CARRERA CREST HOLDINGS

CEO Morning Briefing

Monday, 2026-03-16

Monday, March 16, 2026 | Carrera Crest Holdings

CEO TO DO

3/15/2025

TO DO:

Check on insurance for 92h

Create the TEN Salon lease proposal and send out

Create a draft of TEN Salon purchase agreement email to Erin

Email Melissa at Bello Haven for pricing info

Follow up on the payments sent to Reach Partners Owners as we need to resolve Julie Foliatt issue

Create a template and documentation for Carrera Crest Automation to be sold as a service

Fix 92H issues and get the monthly emails established

Go to DORA and update YCS license

Get DORA transfer paperwork for MM

Text MM about timing of transfer

Follow up on Boulevard access

Go To Chase about 2 new accounts

Deposit more cash

Cairn Property Tax updates and payments

Pay Parking ticket

Find wash basin pipe

Complete and send the Operating Agreements for Cairn Crest and Lugano Crest

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

- **GLOBAL_CONFIG stale** — Megan King (terminated 03-07) still listed as active. Remove immediately to prevent data contamination across dashboards and reports.

- **Inventory shrinkage at -\$1,468.92** — worsening from Feb's -\$1,158. Nearly 3x the -\$500 threshold. Investigation needed today.
- **Breanna Harte at \$0 MTD** — family emergency leave (per your 3/11 note). ~\$3,700/mo capacity gap to manage around.

WARNINGS (MONITOR THIS WEEK)

- **Tashina Miranda** — 36% utilisation, \$17.10/hr vs \$15.16 cost. Marginal improvement from Feb. 30-day decision window active.
- **Deana Faust** — lowest Rev/Hr (\$44.07), lowest utilisation (55%). 13-week trending requested.
- **Alcohol items OOS** — Mimosa weekday/weekend, Raspberry Blonde all out of stock with active demand.
- **Pureology stockouts** — Color Fanatic 21 Spray, Hydrate Shampoo Liter, and several others at zero.
- **Feb 2026 net loss (\$4,273)** — payroll at 76% of revenue (target <65%). 2026 YTD revenue -31% vs budget.
- **SimpliSafe sensor alert** — RoofTop Entry sensor not responding at 92nd Ave (2:15 AM). Check physical sensor.

TODAY'S CALENDAR

Today — Monday, March 16

Time	Event	Duration	Notes
12:00 PM – 12:30 PM	**Matthew Morris X BLVD**	30 min	Boulevard access follow-up (see TO DO)
3:00 PM – 6:45 PM	**The Modern Practice Growth Summit**	3h 45m	Virtual — Goldcast link

No conflicts. Gap from morning until noon.

Tomorrow — Tuesday, March 17

- All Day: Bi-monthly company TEN SALON | St. Patrick's Day
- 11:00 AM: Lugano Ridge LLC / Paychex call (45 min, WebEx)
- 11:45 AM – 1:45 PM: TEN Salon Med Doc (120 min) — **back-to-back with Paychex call, only 0 min gap**

Rest of Week

- **Thu 3/19:** Pick up Luke Penelope (9:30 PM)
- **Fri 3/20:** New Event (9:00 AM) | Eid al-Fitr
- **Sat 3/21:** Brooklyn event (12:30–5:00 PM, duplicate entry) | Wilson Groom @ 1222 E 6th Ave (2:30 PM) — **overlap with Brooklyn**
- **Sun 3/22:** St. Baldricks (10:00 AM–2:00 PM) + St. Baldricks Event (10:30 AM–12:30 PM, salon calendar)

DASHBOARD STATUS

Dashboard	Status	Last Updated	Schedule	Notes
Payroll Dashboard	LIVE	2026-03-16 08:12 (0h ago)	Daily AM + Monday full rebuild	291KB, current
Inventory Dashboard	LIVE	2026-03-16 06:05 (2h ago)	Daily AM	639KB, current
Web Station Index	LIVE	2026-03-16 07:01 (1h ago)	Daily AM	84KB, current
Education Dashboard	NEEDS CREATION	—	TBD	Generator and schedule TBD
Associate Program Dashboard	NEEDS CREATION	—	TBD	Generator and schedule TBD
Marketing Dashboard	NEEDS CREATION	—	TBD	Generator and schedule TBD

DEPARTMENT: INVENTORY

- **Shrinkage: -\$1,468.92** — worsening month-over-month (Feb was -\$1,158). Nearly 3x the -\$500 threshold. FIRE priority.
- **Alcohol items OOS:** Mimosa (weekday & weekend), Raspberry Blonde — all zero stock with active demand. Reorder or remove from menu.
- **Pureology stockouts:** Color Fanatic 21 Spray, Hydrate Shampoo Liter, and several others at zero. Check reorder status.
- **March Mask Promo active** — Fusio-Dose and Chronologiste Masque add-ons appearing in transactions. Ensure promo stock is adequate.
- **Inventory agent failed** — weekly alert report did not generate. Check log: `2026-03-16_inventory_agent_weekly-alerts.log (1 error)`.

DEPARTMENT: EDUCATION

Program Leader: Kaeleigh Tran

Major update — flag for Philip: On **Mar 11**, Kaeleigh posted the full **2026 Education Calendar** to #education (@channel). Key dates:

- **Apr 8, 2–4 PM:** Summit Tracking/Planning for Success w/ Chelsea (Associates/L1 mandatory)
- **Apr 13, 10–4 PM:** Curl Class w/ Lindsey Olson (mandatory in-salon)
- **May 6, 2–4 PM:** Shades EQ PK w/ Jenisa
- **Jun 3, 2–4 PM:** Kerastase Product Knowledge Refresher — **MANDATORY FOR EVERYONE**
- **Jul 8, 2–4 PM:** Retail: Teach, Use, Sell w/ Jenisa
- **Jul 13, 10–4 PM:** Blonding Class w/ Sam Klaver (mandatory in-salon) — 5 heart reactions
- **Aug–Dec:** Monthly classes continuing through year-end

Recent completions: Bello Haven Extension Class (Mar 2, 11 attended), Kerastase Refresher w/ Nicole (Feb 24), Exceptional Salon Service (Feb 16), Redken Shades ALK Mini Class (Feb 3).

Kerastase 2026 virtual education schedule shared — all sessions 90 min, free, QR registration.

Education Dashboard: In development. No target date set.

DEPARTMENT: ASSOCIATE PROGRAM

Program Leader: Chelsea Badjar (Level 6 Stylist)

- APL data could not be loaded today (login required).
 - Chelsea is performing strongly: \$171/hr, 170% utilisation, 88% rebook — leading the team.
 - **New applicant** received via Beautista for the Associate position (iMessage alert, 3/15 10:20 PM). Follow up.
 - Associate Program Dashboard: NEEDS CREATION.
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DEPARTMENT: MANAGER 1:1

- 1:1 data could not be loaded today. Source data unavailable.
 - Unable to determine last COO or Manager meeting dates. Flag: check if 1:1s are overdue.
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CUSTOMER FEEDBACK (OUTLOOK — CONTACT@YACHTCLUBSALON.COM)

No customer emails in the last 24 hours. Quiet period.

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

No emails from Taylor in the last 3 days. No action needed.

Taylor's Briefing Replies: No replies in the last 3 days. The feedback loop is idle — consider prompting Taylor if this persists.

EMAIL HIGHLIGHTS

- **SimpliSafe Error Alert** — RoofTop Entry sensor not responding at 92nd Ave (2:15 AM). Physical check needed.
- **Phorest Week in Review** — Client visits: 248 (+34), Avg bill: \$109 (+\$19), Weekly revenue: \$27K+. Strong week.
- **Looker reports delivered** — Staff Tips Daily and Staff Performance Detail Daily arrived.
- **SalonCentric** — 20% off Matrix & Biolage (2 duplicate emails). Coordinate with inventory needs.
- **Beautista** — new Associate applicant (see Associate Program section).

Skipped: Shu Uemura promo, Summit Salon marketing, Paychex survey reminder, VistaPrint promo.

IMESSAGE (BUSINESS-RELEVANT)

- **SimpliSafe (2:15 AM):** RoofTop Entry sensor not responding at 92nd Ave. *(Also emailed — needs physical check.)*
 - **SimpliSafe (11:29 PM 3/15):** System armed (away mode) at 92nd Ave. Normal.
 - **Beautista (10:20 PM 3/15):** New applicant for Associate position. Review on Beautista.
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PHOREST DATA

20 reports routed to `/data/incoming` at 08:12 AM:

- Staff Performance Detail Daily (3 copies)
- Staff Tips Daily (7 copies — duplicates from retry/backfill)
- Sales Transactions Daily (7 copies — includes backfill for 3/13–3/15)
- Future Appointments 90 Days Daily (3 copies)

Note: High duplicate count (39 warnings in `phorest_router` log) suggests retry loops. May want to investigate dedup logic.

PAYROLL SNAPSHOT

Payroll agent **failed** this morning. Check log: `2026-03-16_payroll_agent_weekly-hours.log` (1 error).

From P&L; data: Feb 2026 payroll was **76% of revenue** — above the 75% alert threshold and well above the 65% target. This is the top financial concern heading into March.

TODAY'S ACTIONS

- **Remove Megan King from GLOBAL_CONFIG** — terminated 03-07, still listed as active (FIRE)
 - **Investigate inventory shrinkage** — \$1,468.92, worsening trend, 3x threshold (FIRE)
 - **Review Beautista associate applicant** — new application received last night
 - **Check SimpliSafe sensor** at 92nd Ave — RoofTop Entry not responding
 - **Prep for Matthew Morris X BLVD call** (12:00 PM) — relates to Boulevard access on your TO DO
 - **Attend Modern Practice Growth Summit** (3:00–6:45 PM)
 - **Review Kaeleigh's 2026 Education Calendar** — posted to #education, confirm alignment
 - **Investigate payroll + inventory agent failures** — both errored this morning
 - **Check Phorest router duplicate warnings** — 39 warnings, possible dedup issue
 - **Note tomorrow's scheduling:** Paychex call ends at 11:45 AM, TEN Salon Med Doc starts at 11:45 AM — zero buffer
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DAYTIME WATCHER (INTRA-DAY AUTO-ACTIONS)

- **[SLACK] 08:01 AM:** Slack channels refreshed (archive sync).

- No other intra-day changes detected.
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AGENT STATUS

completions, iMessage, Ingest, Mail, NAS Sync, Notes Sync, Notes Writeback, Outlook, Slack Sync, Vendor Learning, Watcher, Zoom Router, Cron (all 3)
rogram (1w), Edu Delivery (2w), Phorest Router (39w), Slack Inventory (2w), Slack Pulse (1w), Taylor Delivery (1w), Watcher (13w)
mpiler (2e), COO Daily (1e/1w), COO Weekly (1e/1w), Inventory Agent (1e), Payroll Agent (1e), Slack Post (5e), Taylor SM Daily (1e/2w)
/30w

Key concern: Payroll and Inventory weekly agents both failed. Slack Post had 5 errors (may affect briefing delivery). Phorest router's 39 warnings likely from duplicate file processing.