

END-OF-DAY SUMMARY

Training Guide & Field Reference

The End-of-Day (EOD) Summary is PALOMA's daily record of what happened, how the team performed, and what leadership needs to know before the next shift begins. It is filled out by the Manager on Duty or an Experience Guide throughout the shift and **emailed to leadership before the closer leaves for the night.**

This document serves three essential purposes for our organization:

- **It keeps our founders and General Manager connected to the day-to-day.** Angela and Stella cannot be on the floor every day — the EOD is how they stay informed, catch patterns early, and lead with full context.
- **It drives meaningful conversation about continuous improvement.** Every guest issue, operational friction, and win documented here becomes the foundation for coaching, team discussions, and smarter decisions.
- **It ensures nothing falls through the cracks.** Guest follow-ups, private event inquiries, and unresolved concerns are tracked here so the next team member picks up exactly where you left off — every guest feels the continuity.

Every section serves a purpose. This guide walks you through each one — what it means, what to write, and why it matters.

1 — Daily Sales & Goal Tracking

This section captures the day's revenue at a glance. You'll record:

- **Total Sales:** The day's total revenue from services and retail
- **Daily Goal:** The target set for the day (found in the appointment book or from your manager)
- **FOH Upgrades:** Any upgrades sold by front-of-house staff (Experience Guides) — list each upgrade and amount (e.g. *Upgraded Eva P for extra 30 min +\$30*)
- **Esti/Therapist Upgrades:** Upgrades sold directly by service providers

Be specific — list each upgrade individually with the guest name, what was added, and the dollar amount. This data informs team performance and goals.

2 — Guest Follow-Up Log

Use this section to track any guests who need a callback, rebooking, or follow-up. For each entry, record:

- **Guest Name & Phone:** Full name and best contact number
- **Who Called:** Which team member made or received the call
- **Date Noted:** When the follow-up was first logged
- **Follow-Up Needed:** What action is required (rebook, reschedule, address complaint, etc.)
- **Resolution:** Once resolved, note what was done and by whom
- **Comments:** Any additional context leadership should know

If a guest has been contacted and not responded, note the date and method attempted (e.g. 'called and texted 2/25, no response'). This helps the next team member know where things stand.

3 — Manager on Duty (MOD)

List the names of each MOD who worked throughout the day. If responsibilities shifted mid-day (e.g. morning MOD vs. afternoon MOD), note both.

Example: MOD AM: Annika / MOD PM: Aayana

4 — What Led Us to Achieving Our Goals

Celebrate the wins. Note anything that positively contributed to hitting the day's targets:

- Strong retail section or a refreshed display that drove purchases
- A team member who delivered an exceptional upsell
- A smoothly executed private event or Spa Journey
- High guest satisfaction or volume of rebookings

Be specific and generous — this section builds morale and helps the team understand what's working.

5 — What Led Us to Falling Short

Be honest and constructive. Note anything that created friction or held back the day's performance:

- Guest dissatisfaction with a service or timing issue
- A cancellation or no-show that impacted revenue
- Operational bottleneck (e.g. quick flips, late arrivals)
- Staffing gaps or unexpected call-offs

This is not about blame — it's about pattern recognition. Identifying friction points helps leadership solve recurring issues.

6 — Client Issues & How Did You Resolve

Log every guest concern, complaint, or dissatisfied interaction from the day. For each issue, include:

- **Guest name** and a brief description of the concern
- **What happened** — be factual and thorough
- **How it was resolved** — what was said or offered
- **Who handled it** — initials of the team member involved

Even if the guest left happy, log the issue. Leadership reviews this section to spot patterns and coach the team. If something was handled imperfectly, be honest — this is a learning space, not a blame space.

7 — Appointment Book Commentary

Use this section to give leadership a clear picture of how the appointment book looked and performed. Note:

- **Open/unfilled appointments:** Any time slots that went unbooked
- **Same-day cancellations:** Who cancelled, when, whether the fee was charged
- **No-shows:** Guest name, appointment time, and action taken

- **Late arrivals:** Guest name, how much time was lost, how it was handled

Example: 'Merrisa Shannon called at 9:01am running late — offered shortened service, cancellation fee charged when guest declined.'

8 — Employee Call-Offs & Schedule Adjustments

Log any staffing changes that occurred during the shift:

- Who called off, when, and how much notice was given
- How coverage was arranged (or if it wasn't)
- Any schedule adjustments made on the fly

If there were no call-offs, simply write 'N/A'. Don't leave the section blank.

9 — Clients Who Had an Exceptional Experience

List any guests who expressed genuine delight, gave verbal compliments, or had a standout visit. These guests are prime candidates for a Google Review text.

- Guest name and brief note on what made their visit special
- Initial of the team member who noted it

Example: 'Mara B — sent AG.' This means Mara B had a great experience and Angela sent her a Google Review request.

Sending review requests to genuinely happy guests is one of the highest-impact things we can do for PALOMA's visibility. Don't skip this section.

10 — Operational Issues & Achievements

Flag anything that affected how the building ran — and highlight what went especially well operationally:

- Quick flips that caused or nearly caused room turnover issues
- Supply shortages, equipment issues, or maintenance needs
- Anything the opening team should know to prepare for tomorrow
- Achievements — smooth coordination, a perfectly run event, great teamwork

Example: 'Watch the quick flips for tomorrow — Morgan and Steph M will have a tight overlap if Morgan's 30-minute appointment books.'

11 — Anything Else We Should Know

Use this as a catch-all for anything that doesn't fit neatly elsewhere — guest notes, retail observations, team dynamics, unusual situations, or anything you want leadership to be aware of.

When in doubt, include it. Leadership would rather have more context than less.

12 — Private Event Notes

Log anything related to upcoming or completed private events:

- Inquiries received — guest name, contact info, type of event they're interested in
- Follow-up needed — what action is required and by whom
- Post-event notes — how it went, guest feedback, anything to improve next time

Private event inquiries should be forwarded to events@experiencepaloma.com. Flag any DND (do not disturb) notes clearly so the next team member knows not to reach out independently.

**Submission
Reminder**

The EOD must be **emailed to leadership before the closer leaves for the night**. Complete each section throughout your shift — don't wait until close to fill it all in at once. A strong EOD is one of the most valuable contributions you make to the team.