AAB Monthly Team Huddle

07.23.2026 AGENDA • DEADLINES, PROCESS UPDATES & TEAM ALIGNMENT

Meeting focus: Confirm upcoming deadlines, coordinate open enrollment and fourth-quarter logistics, surface HubSpot needs, and gather input on future huddles.

1 KEY DEADLINES

DEADLINE	DUE DATE
PCORI	**July 31**
Form 5500	**Based on the Effective Date**
HubSpot	**August 19**

2 OPEN ENROLLMENT — PROCESS UPDATES

UPDATE	DETAILS
Calendar access	Juan will begin to share access to his calendar to support scheduling and coordination.
Marketing materials	Emma is assisting with printing. The target is to have materials to Emma at least two to three days in advance. Flexibility is possible, but try to keep to this.

3 DISCUSSION TOPICS

HUBSPOT

- Are any fields or functions missing that would improve the system of record?
- Are any functions, fields, or processes not working as expected?
- Are we on track for the August 19th deadline? How do we feel?

FOURTH-QUARTER PLANNING

- Conference room bookings
  - Recurring meetings must be scheduled no more than 2 weeks in advance.
  - Send Emma a message if the scheduled conference room will no longer be used or needed.
- Emma's printing schedule
  - Once you know the Open Enrollment dates, share them with Emma and she will coordinate with you on printing materials.
  - Opinions on printing marketing materials? Is it useful or wasteful?
- Preferred huddle length: 15, 30, or 60 minutes

4 TEAM FEEDBACK & SUGGESTIONS

- What would make these meetings most valuable? What do you want to gain?
- What topics should be included in future huddles?
- Are there any additional ideas, questions, or concerns to discuss?