AAB Monthly Team Huddle

08.13.2026 AGENDA • KEY DATES, PROCESS UPDATES & TEAM ALIGNMENT

Meeting focus: Confirm key dates, review process and system updates, align on renewals and new hire enrollment, and gather input on future huddles.

1 KEY DATES

ITEM	DATE
HubSpot Training	**August 14**
HubSpot	**August 19**
Next Huddle	**September 16**

2 PROCESS UPDATES

UPDATE	DETAILS
Calendar Access	Everyone should have permission to access Juan's calendar.
Marketing Materials	Emma is still a resource to use for printing materials. AAB is looking into a printing station that anyone can use if needed. The new location will have one
HubSpot Field Request Link	Found in the Resource Center. The link can be bookmarked for quick use.
Ignite AI	Use this to quickly find information in your client folders.

3 DISCUSSION TOPICS

TOPIC	POINTS TO COVER
HUBSPOT	
Open Training Sessions	Beginning Bi-weekly training sessions. The first portion will be a demonstration; the second portion will be for Q&A and hands-on.
Knowledge-Based Resources	Loom videos, Scribe screenshot steps, and huddle agendas.
RENEWALS, QUOTING, & NEW HIRE ENROLLMENT	
Renewals	Alex and Shahmir will be taking the lead of the renewal process on Hubspot.
Hub AI	Has been updated and now useful to find information through HubSpot.
New Hire Enrollment Meetings	Current Process: Juan will not be pulling the census for the groups; account management team will need to provide it. Juan will send a reminder in advance of what is needed.

4 TEAM FEEDBACK & SUGGESTIONS

Huddles	Every third Wednesday of the month; 1 hour long
Out of Office	Include or Forward email to the person who is out of the office to keep them informed.
Future Topics	Emma will be sending out an email for topics
Open Floor	Are there any additional ideas, questions, or concerns to discuss?