

Mid-Year Legal Management Roundtable: Member Preparation Worksheet

KYALA Member Meeting | July 9, 2026 | 11:45 a.m. - 1:00 p.m.

Please complete before the meeting and bring this with you. Be ready to share one challenge, one question, and one best idea from your firm.

Name/Firm (optional): _____

Discussion Area	Notes to Bring / Share
1. Staffing & Retention <i>Morale • Remote/Hybrid • Overtime • Burnout</i>	- What is one staffing/retention challenge your firm is facing? - What is helping your firm keep good employees or improve morale? - Any issues or tips with hybrid/remote requests, overtime, or burnout?
2. Technology & AI in Law Firms <i>Tools • AI Policy • Cybersecurity • DMS</i>	- What tools or systems are saving time at your firm? - Does your firm have an AI policy? ☐ Yes ☐ No ☐ In progress - Any cybersecurity, document management, or training concerns to discuss?
3. Mid-Year HR & Policy Checkup <i>Handbook • PTO • Dress Code • Timekeeping</i>	- What policy/handbook reminders or updates are needed mid-year? - Any PTO, dress code, confidentiality, timekeeping, or performance issues? - What question would you like to ask the group?
4. Best Idea Swap <i>Appreciation • Workflow • Cost Saving • Onboarding</i>	- Share one thing your firm has done this year that worked well. - Examples: appreciation idea, workflow improvement, cost-saving tip, onboarding process, or communication strategy. - Why did it work, and could another firm use it?

My top question or item I hope to discuss:
