



BalanceWorks® Newsletter

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Learn How to Set Short-Term and Long-Term Goals

Planning is the foundation for success.

- Long-term plans describe what you expect to accomplish in the next three months, as well as any project that will take longer than a week.
- Short-term plans cover what you want to accomplish today or this week. Short-term plans also can be steps toward longer-term objectives.

Long-Term Planning

Establish Objectives

Do you want to manufacture 6 million widgets in four months? Reconcile accounts for all past due receipts by the end of the year? The first step in long-term planning is establishing objectives.

Determine What You Need to Meet Your Goals

What materials and machinery do you need to produce those widgets? How many accountants are on hand to reconcile the books? If you don't have enough supplies, where can you find more? The second step is to make sure you have what you need to reach your goals.

Assign Responsibility

Decide who will operate the widget press and supervise the operators. Appoint a chief accountant. Make sure the department is staffed to meet the needs of the project.



For more information or support about setting goals, contact the work/life experts at **BalanceWorks®** by calling:

1.800.327.2255

eni's BalanceWorks® program is a confidential 24/7 service provided by your employer to help achieve work/life balance.



Define Action Steps

What are the steps in manufacturing widgets? What resources do you need to reconcile the books? Outline the process for each project. Action steps become part of your short-term plans.

Schedule Action Steps

With your action steps in hand, schedule tasks to meet your goals within a defined timeline. Use yearly, monthly and weekly calendars to help schedule your time. How many widgets must you produce each month to meet your goal?

Select Start Dates

Set a date that will allow completion by your target date. When does the manufacturing process start?

Provide Ways to Measure Progress

How many widgets have been pressed, boxed and shipped after one month, two months or the first quarter?

Short-Term Planning

Weekly Plans

A weekly plan should describe what you want to accomplish by the end of the week and the activities needed to get you there. Weekly plans can be developed on Friday for the following week, over the weekend or on Monday morning. Many people use commute time for this activity.

Daily Plans

If you make a habit of using a daily calendar, many of your activities will already be recorded. This is the best way to develop your "things to do today" list. A daily prioritized list is the best way to focus your attention on your most important objectives. Work from the top of your list. When unexpected demands arise, assess their priority and handle them accordingly. At the end of each day, carry forward any items that need completing. Reprioritize these with tomorrow's new items.



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