

Performance Perspectives

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Beware of Tax Scams

Don't fall victim to tax scams. These schemes take several shapes, ranging from promises of large tax refunds to illegal ways of "un-taxing" yourself.

The IRS suggests that you remember three important guidelines:

1. You are responsible and liable for the content of your tax return.
2. Anyone who promises you a bigger refund without knowing your tax situation could be misleading you.
3. Never sign a tax return without looking it over to make sure it is accurate.

Beware of these common schemes:

Return Preparer Fraud

Dishonest tax return preparers can cause many headaches for taxpayers who fall victim to their ploys. Such preparers derive financial gain by skimming a portion of their clients' refunds and charging inflated fees for return preparation services.

They attract new clients by promising large refunds. Choose carefully when hiring a tax preparer.

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*Are You Finding,
Training & Retaining
Good Employees?*

State of Recruiting

Currently we are experiencing the deterioration in financial market conditions, a turbulent election period, a credit/housing crisis, and increased energy costs. The national index indicates a slowdown in economic growth.

In a recent survey, CEO's of small to mid-sized businesses indicated a significant drop in confidence; a five-year low. Most CEO's surveyed expect the overall economy to weaken but they anticipate much smaller declines in their own firm's revenues, profits and employment in the coming year as they

stated they will remain dedicated to finding and retaining good employees. More than half of the business leaders surveyed think the economy will worsen but they have no plans to scale back recruitment and in fact, they plan to increase their payroll in 2008. Most of these companies state they will raise prices in response to the increased costs of production but staffing remains their most significant issue. Finding, training, and retaining good employees are issues that have remained on the top of their agendas to position their firms for future growth.

The following are some practical things that you can do in this slowing economy:

1. **Make finding, training and retaining top performers your number one priority.** Double your current recruiting efforts. You need top performers on your team. You simply cannot afford to tolerate marginal performers who statistically account for about 10% of every business. You can direct these marginal workers to other career options.
2. **Communicate with each employee.**

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As the saying goes, if it sounds too good to be true, it probably is. No matter who prepares your tax return you are ultimately responsible for its accuracy and for any tax bill that may arise due to a questionable claim.

Identity Theft

It pays to be choosy when it comes to disclosing personal information. Identity thieves have used stolen personal data to access financial accounts, run up charges on credit cards and apply for new loans. The IRS is aware of several identity theft scams involving taxes or scammers posing as the IRS itself. The IRS does not use e-mail to contact taxpayers about issues related to their accounts. If you have any doubt whether a contact from the IRS is authentic call 800-829-1040 to confirm it.



Frivolous Arguments

Promoters have been known to make outlandish claims that the Sixteenth Amendment concerning congressional power to establish and collect income taxes was never ratified; that wages are not income; that filing a return and paying taxes are merely voluntary; and that being required to file Form 1040 violates the Fifth Amendment right against self-incrimination or the Fourth Amendment right to privacy. Don't believe these or other similar claims. Such arguments are false and have been thrown out of court. Taxpayers have the right to contest their tax liabilities in court, but no one has the right to disobey the law.

Rebate Phone Call

At least one scheme using the word "rebate" as part of the lure has been identified. In that scam, consumers receive a phone call from someone identifying himself as an IRS employee. The caller tells the targeted victim that he is eligible for a sizable rebate for filing his taxes early. The caller then states that he needs the target's bank account information for the direct deposit of the rebate. If the target refuses, he is told that he cannot receive the rebate. This phone call is a scam. No legislation has yet been enacted that would allow the IRS to provide advance payments to taxpayers or that determines the details of those payments.

Moreover, the IRS does not force taxpayers to use direct deposit.

Continued on next column –

Those who opt for direct deposit do so by completing the appropriate section of their tax return, with bank routing and account information, when they file; the IRS does not gather the information by telephone.

Refund E-Mail

The IRS has seen several variations of a refund-related bogus e-mail which falsely claims to come from the IRS, tells the recipient that he or she is eligible for a tax refund for a specific amount, and instructs the recipient to click on a link in the e-mail to access a refund claim form. The form asks the recipient to enter personal information that the 'scamsters' can then use to access the e-mail recipient's bank or credit card account.



In a new wrinkle, the current version of the refund scam includes two paragraphs that appear to be directed toward tax-exempt organizations that distribute funds to other organizations or individuals. The e-mail contains the name and supposed signature of the Director of the IRS's Exempt Organizations business division.

This e-mail is a phony. The IRS does not send unsolicited e-mail about tax account matters to individual, business, tax-exempt or other taxpayers.

What to Do

If you have received a questionable e-mail or phone call claiming to come from the IRS please forward it to phishing@irs.gov, using instructions contained in an article on IRS.gov titled "How to Protect Yourself from Suspicious E-Mails or Phishing Schemes." Following the instructions will help the IRS track the suspicious e-mail to its origins and shut down the scam.

For more information about these and other tax scams visit the IRS Web site at www.IRS.gov.

"Few of us ever test our powers of deduction, except when filling out an income tax form."

— Laurence J. Peter, author

"People who complain about taxes can be divided into two classes: men and women."

— Unknown

"To give real service you must add something which cannot be bought or measured with money, and that is sincerity and integrity."

— Douglas Adams

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Let every employee know, on a one to one basis, that the economy is getting rough and that every possible unnecessary cost must be cut. Ask employees where they think costs can be cut. The Southwest Airline employees who cleaned the airplanes suggested replacing expensive trash bags imprinted with the corporate logo with ordinary trash bags and the company realized significant savings throughout the years. In addition, listen to each employee and make sure they have what they need to do their jobs.



3. **Set the example.** You must show your employees that you are serious about making corporate and personal sacrifices. You may consider picking up your speed and sense of urgency and controlling costs since you set the tempo for your employees.
4. **Be honest with your employees.** The less time your employees spend worrying and wondering, the less productive time is wasted. If your employees are afraid of losing their jobs, the best ones will leave first.

Many experts believe that a recession is very good because it cleans out the weak, just as a naturally occurring forest fire cleans out the dead wood. You can maximize your competitive advantage by having those top performers on your team.

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Teams From Around the Wheel

Every Unique Style is Necessary for a High Performing Team

Your behavioral style is great, and so is everyone else's! That's right, each and every behavioral style has unique strengths vital to a successful team.



Since individuals can't possibly have the natural traits of every style, it is important to build a team around the wheel of behaviors to achieve the most dynamic group. High performing teams need the traits of every behavioral style, from the demanding "D" to the compliant "C". When each person's unique behavioral style is recognized and appreciated by the team members, you will see significant results. Efficient communication, less stress and accurate job assignments will be easier to accomplish.

The same concept is true of motivators. Everyone sees a situation, problem or decision through their own eyes, a different window through which we view the world. When a team can understand the motivations of one another, they can begin to understand the thought behind each individual idea. Once all ideas are appreciated, team decisions will come naturally.

With a team from around the wheel of behaviors and motivators, a company can utilize a more diverse thought process; one that will yield better results. Where does your team fit in the wheel? Reply today to learn how we can assess your team's behavioral style and motivations!

Consider More Than Just One View of an Individual...Implement Research-Based Solutions Today!

'Aldermanisms' Words of Wisdom

By Robert Alderman



Why are you so afraid?

*Do you remember a time as a child when your parents said, "be sure and take some risks today?" You never heard this one time. Your lack of risk taking is in direct proportion to your fear level. Stop playing that old **fear** message and take some risks. **Risk will set you free.***

Minutes are assets, invest wisely.

Prepare To Win!

The prepared person will inevitably defeat the person not prepared. The hours you invest in your plan will win you the spoils. The person not prepared will only get the crumbs. Preparation time is platinum time. It is the best investment you can ever make.

The best way to be admired is to show and admit your faults.

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Robert's Report – by Robert Alderman

Is Communication the Culprit?

Appropriate Direction & Clear Guidelines are Vital to Superior Performance

Many companies, from large to small, have a difficult time with employees that are just not measuring up to performance standards, yet they seem to have the potential to take it to the next level. Does this sound familiar to you? The root of the problem may be a lack of communication within your organization. In order to expect superior performance, the job must be clearly defined and employees must know exactly what is expected of them. This can be more difficult than it seems, which is why it is often disregarded and thus becomes the cause of employee disengagement and poor performance.

To enhance the communication of job expectations, a clear job benchmarking process should be used to define and prioritize the key accountabilities required by the job. **Throughout the job benchmarking process, it is important to consider:**

- ☞ The job itself, not the people in the job
- ☞ Natural biases and how they affect the job benchmarking process
- ☞ The job's most important contribution to the company
- ☞ Performance objectives that require the most time and which are most important
- ☞ Your long-term strategic plan and its effect on the position
- ☞ The behaviors necessary and the rewards for superior performance
- ☞ The hard and soft skills vital to the job
- ☞ How the job will motivate the employee to keep them "plugged in" and engaged in work



By sharing the job benchmark with your employees in a formal manner, they will have the appropriate direction and clear guidelines to give them new-found role awareness and the motivation to succeed.

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