

Introduction

Most businesses are unknowingly overpaying in multiple areas of their operations. This checklist is designed to help you quickly identify where inefficiencies may exist and where immediate cost-saving opportunities can be implemented. “Hidden in Plain Site”

What Sets Mark Apart

Backed by decades of cultivated partnerships,

Mark provides privileged access to preferred pricing,

specialized rates, innovative technologies, and exclusive opportunities—delivering a level of advantage that extends well beyond conventional operations.



1. Insurance Optimization

- Are your policies reviewed annually?
- Are coverage limits aligned with your actual risk?
- Are you overpaying for workers' compensation?
- Have you explored alternative carriers or structures?

2. Payroll & Employee Costs

- Are employee classifications accurate?
- Are you maximizing tax-advantaged benefits?
- Are you overpaying for benefits without structure?
- Is your payroll system optimized for efficiency?

3. Financing & Credit

- Are you using high-interest financing unnecessarily?
- Do you have access to better lending options?
- Is your business credit optimized?
- Are personal and business credit properly separated?

4. Operational Efficiency

- Are manual processes costing time and money?
- Could automation reduce administrative workload?
- Are there duplicated or unnecessary expenses?
- Are you using the right tools for your business size?

5. Revenue & Growth

- Do you have consistent New Client Acquisition / Lead Generation Engine?
- Is there a follow-up and retention system in place?
- Are you leveraging partnerships and referrals?
- Are you maximizing your current client base?

*This list allows you to quickly identify potential areas of attention. Mark takes a detailed, analytical approach into each of the areas outlined above, highlighting cost cutting opportunities, cashflow leaks, and immediate areas for revenue/income generation opportunities. Ultimately, providing you with real solutions to cut costs, increase revenue and protect what is yours.

Request a Full Costs Analysis Today (enriquezmark@msn.com)