RONALD C. MORSE

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Business Analyst | Insurance Operations & Business Systems

Insurance business systems analyst with 15+ years of experience supporting insurance operations, business applications, and internal users in small, high-trust environments. Experienced in gathering and documenting business requirements, supporting production systems, troubleshooting issues, and serving as a liaison between business teams and IT. Known for practical problem-solving, strong insurance domain knowledge, and clear documentation and training.

Core Competencies

- Business Requirements & Process Analysis
- Insurance Operations & Client Workflows
- Submission Intake & Data Quality
- Reporting, Metrics & Executive Visibility
- Cross-Functional Stakeholder Collaboration
- Process Standardization & SOP Development
- Change Management & Deployment Readiness
- CRM & Internal Business Systems Enablement
- Vendor & Platform Coordination
- Training, Documentation & Knowledge Sharing

Professional Experience

Relation Insurance Services & Stamford Insurance Group **- Stamford, CT**

Operations Analyst / Business Support Specialist / Operations & IT Manager *2000 - 2025*

Process & Business Analysis

- Partnered with leadership and subject-matter experts to analyze operational workflows across client servicing, submissions, compliance, and internal reporting, identifying gaps and improvement opportunities.
- Served as a translation point between business stakeholders and technical teams or system solutions, helping convert operational needs into clear requirements and practical system outcomes.
- Translated business needs into standardized workflows, SOPs, intake forms, and reference materials that supported consistent execution and system adoption across teams.

Systems & Knowledge Enablement

- Led analysis and coordination for multiple CRM and document system migrations, supporting requirements gathering, workflow mapping, data transition, and user adoption.
- Administered and optimized CRM, onboarding, compliance, and document-management platforms to support day-to-day operations and reporting needs.
- Created and maintained centralized knowledge-sharing systems (SharePoint) to support cross-office collaboration, training, and consistent execution across distributed teams.

Reporting & Data Analysis

- Developed operational and performance reporting to provide leadership with visibility into servicing activity, marketing effectiveness, and business trends.
- Strengthened data quality and usability within CRM and internal systems, enabling more reliable reporting and analysis.
- Prepared summaries, analysis, and presentations for leadership to support operational planning and decision-making.
- Utilized Microsoft Access to model relationships across multiple disconnected data sets, enabling analysis and reporting where no unified source system existed.

Regulatory & Compliance Enablement

- Analyzed and standardized insurance licensing and regulatory workflows for individuals and corporate entities, improving tracking, documentation accuracy, and audit readiness.
- Supported insurance-specific compliance and risk management processes (including E&O and corporate filings) by improving documentation, tracking workflows, and internal visibility.
- Designed and supported training and continuing education workflows to ensure regulatory compliance and successful adoption of new systems and processes.

Cross-Functional Delivery & Change

- Coordinated cross-functional initiatives involving operations, sales, compliance, finance, IT, and external vendors, ensuring alignment and smooth execution.
- Supported post-acquisition integrations by aligning workflows, systems, documentation, and reporting practices, reducing disruption and accelerating stabilization.
- Served as liaison between business users, leadership, and vendors to ensure solutions aligned with operational requirements and strategic goals.

Selected Impact Highlights

- Improved submission intake and client servicing outcomes by standardizing data capture, documentation, and internal workflows, reducing rework and increasing consistency across teams.
- Enabled leadership decision-making by creating operational and performance reporting across fragmented systems, improving visibility into service activity, marketing effectiveness, and business trends.
- Supported regulatory readiness by standardizing licensing, compliance, and continuing education workflows, improving auditability and reducing operational risk.
- Accelerated post-acquisition stabilization by aligning workflows, systems, training, and reporting practices, reducing integration timelines from months to weeks.

Tools and Technology

- Microsoft Excel, Access, PowerPoint
- Microsoft 365 (Teams, SharePoint)
- CRM Administration (Vertafore AMS360 & ImageRight / Applied TAM / IVANS Exchange)
- Lucidchart | Documentation & Process Mapping

Education

State University of New York **- Purchase, NY**

Conservatory of Theatre Arts, Design/Technology

Selected Testimonial

“Ronald wore many hats with expertise, enthusiasm, and dependability. His contributions spanned project management, logistics, customer service, data organization, and beyond. His initiative in creating custom software solutions significantly improved workflows, and his rare ability to handle both high-level strategy and detailed execution was instrumental to our growth from 3 to 62 employees across 13 locations."

— Brian E. Rogers, CEO, Stamford Insurance Group