



# RONALD C. MORSE

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## HIGHLIGHTS PORTFOLIO

Prepared for:

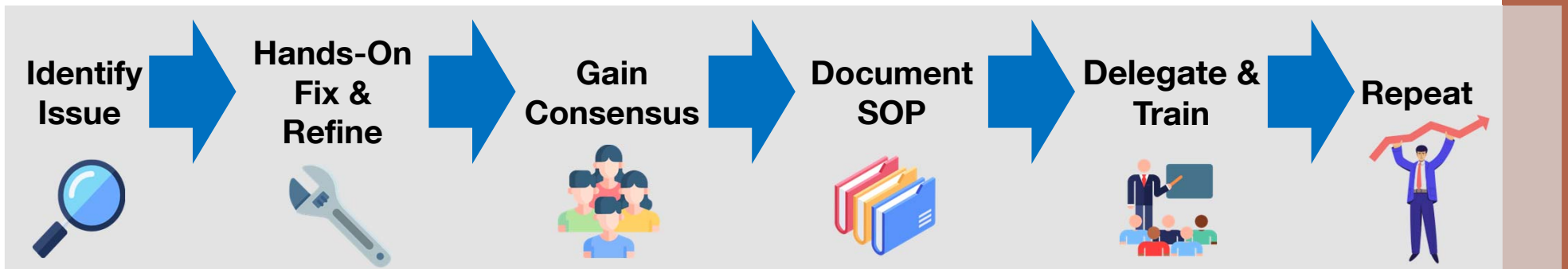


# OPERATIONS LEADERSHIP & PROCESS INNOVATION

Turning daily challenges into scalable systems

*Directed the operational backbone of a growing insurance agency, managing core functions such as CRM systems, document management systems, knowledge-sharing, compliance, onboarding, and more.*

*Designed, tested, and implemented SOPs across sales, marketing, accounting, and compliance.*



*This iterative approach enabled rapid, efficient scaling, strengthened cross-team collaboration, and **freed leadership** to focus on growth and strategy.*

# PROJECT: M&A / OFFICE INTEGRATION - BROOKLYN CT

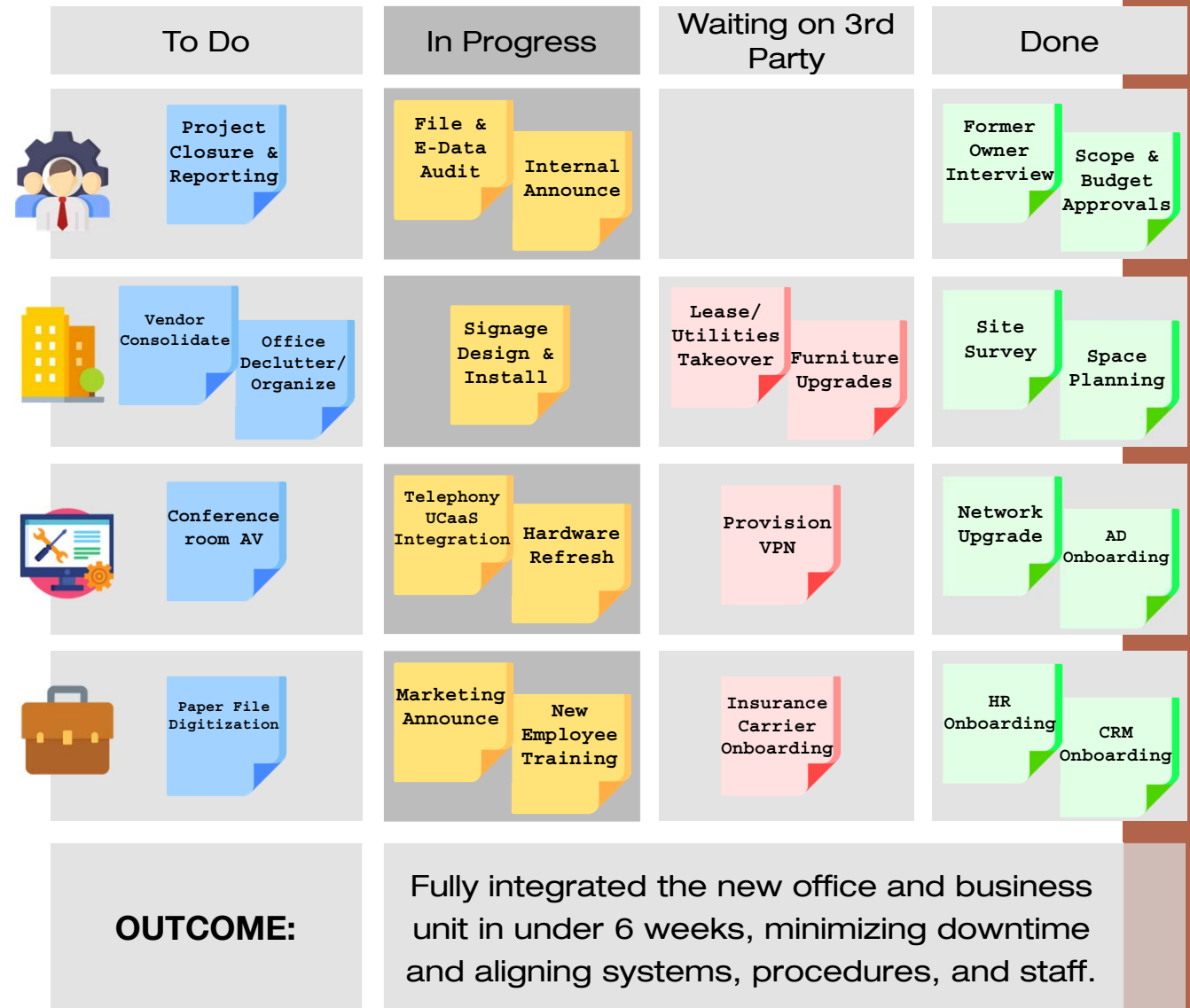
From Strategy Sessions to On-Site Execution: Every Detail Covered

*Took charge of integrating a newly acquired office and business with new employees, reams of ancient paper files, failing hardware and scattered electronic data to secure.*

*Juggling IT migrations, telecom upgrades, and vendor consolidation while handling space planning, signage, and training. One moment finalizing budgets with leadership, the next configuring network gear or crafting marketing announcements.*

*Coordinated teams, vendors, and employees to deliver a fully operational, branded, and compliant location smoothly, on time, and without missing a beat.*

## Project Snapshot:



# PROJECT: COMMUNICATIONS CONSOLIDATION - EAST COAST

Brought Order to the Chaos for 100 office sites and 400+ users

*Managed consolidation of phone systems across 100 East Coast offices, eliminating inconsistent menus and routing failures that left customers at dead ends.*

*Partnered with leadership to design a unified routing plan that merged service teams while preserving local sales support.*

*Drove execution hands-on, quickly resolving issues, boosting team efficiency, and improving the customer experience.*

*Enabled visibility and reporting, making business intelligence possible and preparing the organization for automated service call routing.*

## Before:

- Multiple Dead-Ends
- Underutilized or Overworked Teams
- Lack of BI Data



## After:

- Happy Clients & Stakeholders
- Fully Utilized Teams
- Useful Data





# FULL-SCOPE IT MANAGEMENT

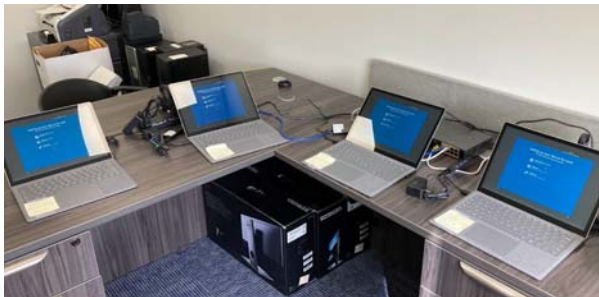
## Keeping Tech Agile, Adaptable, and Affordable

*Managed end-to-end IT infrastructure for a 60+ person, 12-location insurance agency.*

*Covering everything from strategic planning, software deployment, & hardware provisioning; to networking, security and end-user support, while keeping systems agile and cost-effective.*

*Partnered closely with leadership to ensure technology aligned with operations, enabling rapid integration of new offices.*

*Delivered system integrations that employees and stakeholders consistently praised for improving performance and productivity.*



Quickly learns new applications and, more impressively, applies them effectively to streamline operations. His initiative in creating custom software solutions significantly improved internal workflows, and his ability to handle both high-level strategy and detailed execution is rare and valuable.

Brian E. Rogers  
VP, Relation Insurance  
CEO, Stamford Insurance Group

He was key to installations and training for new systems. He exhibited a great deal of patience as the tech support contact for over 65 employees.

Deborah Brosy  
Finance Director, Stamford Insurance Group

Ron's wealth of IT knowledge... made him an invaluable asset. Whether it was working behind the scenes to resolve issues, opening new offices, or setting up new employees for success.

Lisa Lingle  
External Growth Lead, Relation Insurance

# PROJECT: OFFICE MOVE – STAMFORD CT LOCATION

Exceptional Workplace Experience with Zero Downtime and Cost Savings

*Led and executed all aspects of a strategic office relocation from a 5,000+ sq. ft. space to a right-sized facility for a 7-person team.*

*Achieved virtually zero downtime, reduced monthly costs by thousands of dollars, and delivered a flagship, HQ-quality workspace tailored to our niche market and high-value sales and service teams.*



Executive Office



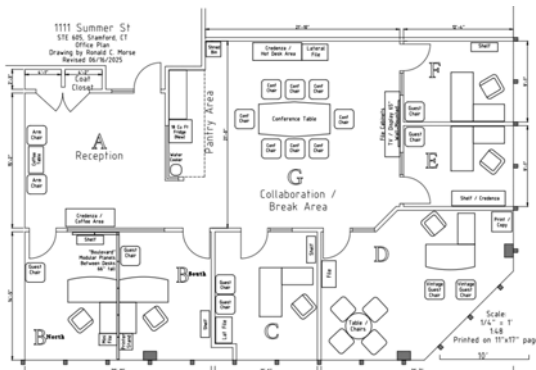
Branded Reception



Central Collaboration



Associate Offices



# Let's Discuss How I Can Help Your Client Succeed

“Simplicity and complexity are the same thing, or to state it in other words  
–there is a point where simplicity becomes very complex.”

*Richard M. Palmer: The Lighting Art*

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