



# RONALD C. MORSE

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HIGHLIGHTS PORTFOLIO

Prepared for:

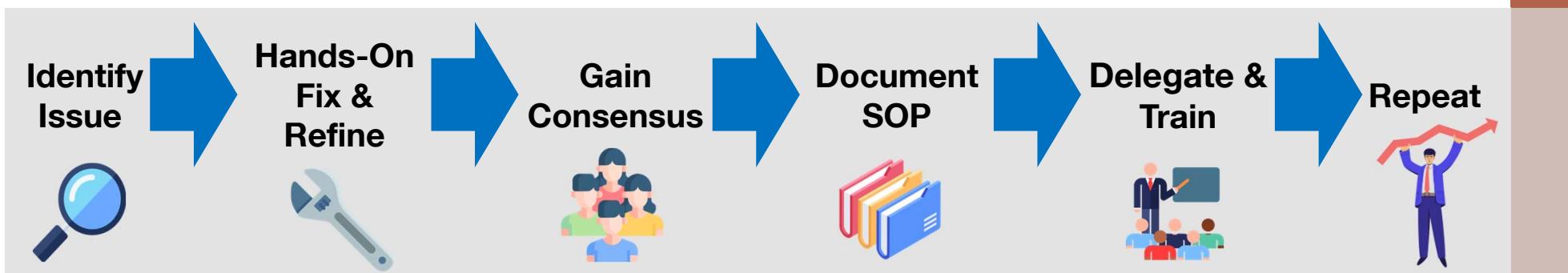


# OPERATIONS LEADERSHIP & PROCESS INNOVATION

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.*

# THE RIGHT HAND OF THE CEO

Trusted, Discreet, and Always Two Steps Ahead

*Acted as the CEO's trusted confidant and right-hand, anticipating needs and addressing issues before they surfaced. Maintained discretion and professionalism as the first call in crises.*

*Turned rough concepts into polished presentations and communications. Delivered data analysis, research, and feasibility studies to guide decisions.*

*Orchestrated the back-end of sales, training, and morale-building meetings, ensuring flawless execution under pressure, often serving as an Executive Assistant in all but title, enabling leadership to stay focused on growth and strategy.*



In a small business environment, every team member needs to wear many hats — and Ronald wore them all with expertise, enthusiasm, and dependability.

Brian E. Rogers  
CEO, Stamford Insurance Group

# 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



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

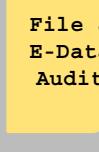
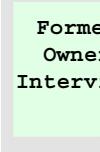
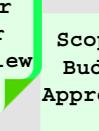
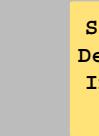
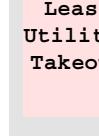
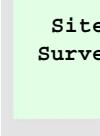
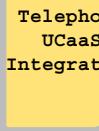
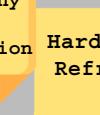
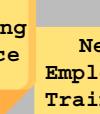
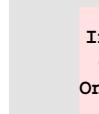
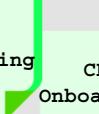
## From Strategy Sessions to On-Site Execution: Every Detail Covered

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:

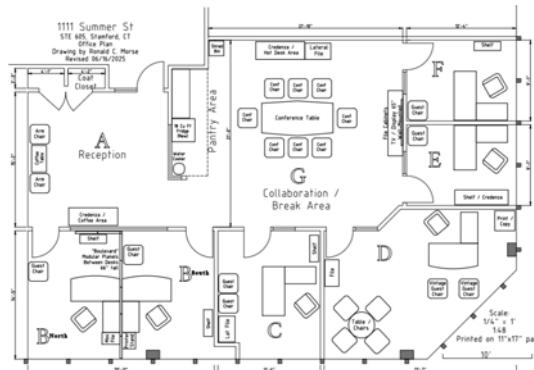
To Do	In Progress	Waiting on 3rd Party	Done
 Project Closure & Reporting	 File & E-Data Audit  Internal Announce		 Former Owner Interview  Scope & Budget Approvals
 Vendor Consolidate  Office Declutter/ Organize	 Signage Design & Install	 Lease/ Utilities Takeover  Furniture Upgrades	 Site Survey  Space Planning
 Conference room AV	 Telephony UCaaS Integration  Hardware Refresh	 Provision VPN	 Network Upgrade  AD Onboarding
 Paper File Digitization	 Marketing Announce  New Employee Training	 Insurance Carrier Onboarding	 HR Onboarding  CRM Onboarding
OUTCOME:		Fully integrated the new office and business unit in under 6 weeks, minimizing downtime and aligning systems, procedures, and staff.	

# 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.*



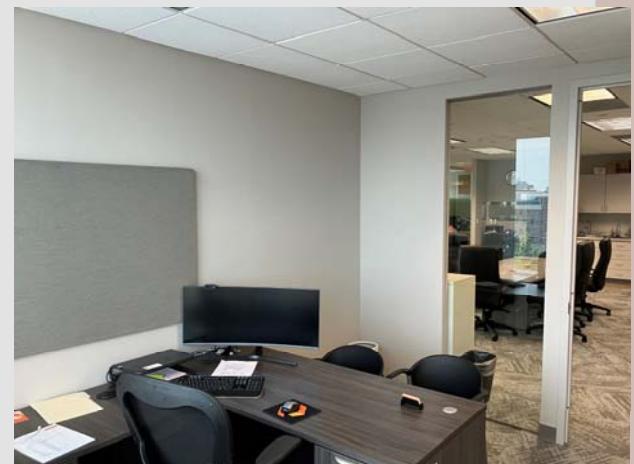
Executive Office



Branded Reception



Central Collaboration



Associate Offices

# CONDO BOARD LEADERSHIP & GOVERNANCE

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## Brighton Court Condo Association

President & Board Member | 37-unit residential community

*Leads a volunteer board governing a residential condominium with legacy infrastructure, balancing fiscal responsibility, resident needs, and long-term asset stewardship.*

### Governance & Capital Stewardship

- Guided the board through end-of-life boiler replacements serving distinct building zones, executed across two calendar years to maintain continuity of heat, hot water, and regulatory compliance.
- Led the decision to self-fund major capital replacements rather than finance, avoiding long-term interest expense and management overhead while maintaining reserves and owner confidence.
- Navigated Connecticut boiler inspection and licensing requirements for residential buildings, coordinating preventive maintenance and inspections to minimize downtime and compliance risk.

### Board Leadership

- Facilitated annual meetings and board discussions involving high-stakes financial and operational decisions, keeping conversations productive and decision-focused.
- Serves as a steady, empathetic voice during heated discussions—balancing resident concerns with clear authority and forward progress.
- Builds trust through transparency, preparation, and follow-through, helping owners understand tradeoffs and stay aligned with long-term community interests.



# Let's Discuss How I Can Help Your Organization 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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