

# RONALD C. MORSE

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## OPERATIONS, CARRIER & INTEGRATION LEADER

Insurance operations and technology leader with 20+ years of experience in carrier/vendor management, M&A integrations, code structure administration, and operational scaling. Trusted by executives to deliver seamless transitions, maximize carrier value, and ensure compliance across multi-state offices. Skilled at balancing foresight with hands-on execution; from managing carrier agreements to configuring systems, training employees, and solving problems under pressure.

## CORE COMPETENCIES:

- Carrier Integration
- Vendor Management
- Carrier Code Structure
- Carrier & Licensing Compliance
- Data Analysis & Reporting
- Mergers & Acquisitions Support
- Carrier Revenue Support & Optimization
- CRM / DMS Admin & Migrations
- Employee Onboarding
- Access Control
- SOP Development
- Workflow Optimization
- IT Systems Admin
- Cross-Functional Project Management

## PROFESSIONAL EXPERIENCE:

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

*Operations Analyst / Business Support Specialist / Manager: Operations & IT*

2000 – 2025

#### Carrier & Vendor Management

- Partnered with agency leaders and end-users as primary stakeholders, leveraging carrier and vendor platforms to align contracts, code structures, and access systems across 13+ offices; ensuring accuracy, compliance, and operational efficiency.
- Managed secure employee access to carrier platforms, UCaaS, and CRM systems; coordinated onboarding with HR/IT to maintain compliance.
- Analyzed vendor performance and partnered with executives on carrier revenue optimization initiatives resulting in cost savings and alignment of our markets.

#### M&A Integration & Operational Scaling

- Directed post-acquisition integrations including CRM/DMS migrations, carrier/vendor platforms, and IT strategy; consolidating legacy data into compliant, scalable systems and cutting integration timelines from months to weeks.
- Migrated and/or digitized thousands of legacy paper and electronic records, implementing structured filing and retention practices to ensure compliance, accessibility, and operational continuity during branch acquisitions.
- Coordinated budgets, IT/telecom upgrades, workspace readiness, and employee training to deliver fully branded branch integrations with zero downtime.
- Standardized onboarding playbooks for staff and systems during acquisitions, ensuring employees gained timely carrier access, training, and compliance alignment.

## **Carrier Systems Management**

- Maintained and updated carrier/vendor codes, ensuring consistent documentation across systems.
- Streamlined workflows across sales, service, finance, and compliance, reducing errors and improving reporting visibility.
- Administered Insurance CRM/DMS systems supporting agency vision, departmental projects and end-users in AMS360, ImageRight and proprietary platforms.

## **IT & Access Administration**

- Oversaw IT infrastructure for 12-location, 60+ employee enterprise, including networking, hardware refreshes, security, and end-user support.
- Led nationwide UCaaS consolidation to RingCentral across 100+ offices and 400+ users, eliminating inconsistent platforms and reducing annual costs.
- Ensured secure and reliable provisioning of employee accounts, licenses, and access credentials across all systems.

## **Executive Partnership**

- Served as trusted right hand to CEO, bridging leadership vision with operations.
- Anticipated issues, provided data analysis and feasibility studies, and delivered polished communications for leadership.
- Frequently functioned in a Chief-of-Staff capacity, orchestrating executive meetings, sales events, and crisis response.

## **TOOLS AND TECHNICAL PROFICIENCY HIGHLIGHTS:**

**Insurance & Carrier Platforms:** Vertafore AMS360/ImageRight, Applied Systems TAM, Zywave, Agency Revolution, Proprietary carrier platforms

**Productivity & Data:** Microsoft Suite (Excel, Access, PowerPoint), Adobe Creative Suite.

**Systems & Admin:** Microsoft 365, SharePoint, Unified Communications (RingCentral).

**Facilities & Planning:** CAD layout/drafting, LucidChart.

## **EDUCATION:**

**State University of New York**

**- Purchase, NY**

*Conservatory of Theatre Arts, Design/Technology*

*Extensive professional development in operations, carrier/vendor management, and IT systems (equivalent to bachelor's-level experience).*

## **SELECTED TESTIMONIALS:**

“Ronald’s contributions spanned project management, logistics, customer service, data organization, and beyond... During his tenure, we grew from a modest three-person team to 62 employees across 13 locations in four states.”

**—Brian Rogers, CEO, Stamford Insurance Group**

“Quickly learns new applications and, more impressively, applies them effectively to streamline operations... His ability to handle both high-level strategy and detailed execution is rare and valuable.”

**—Lisa Lingle, Growth Leader, Relation Insurance**