



# RONALD C. MORSE

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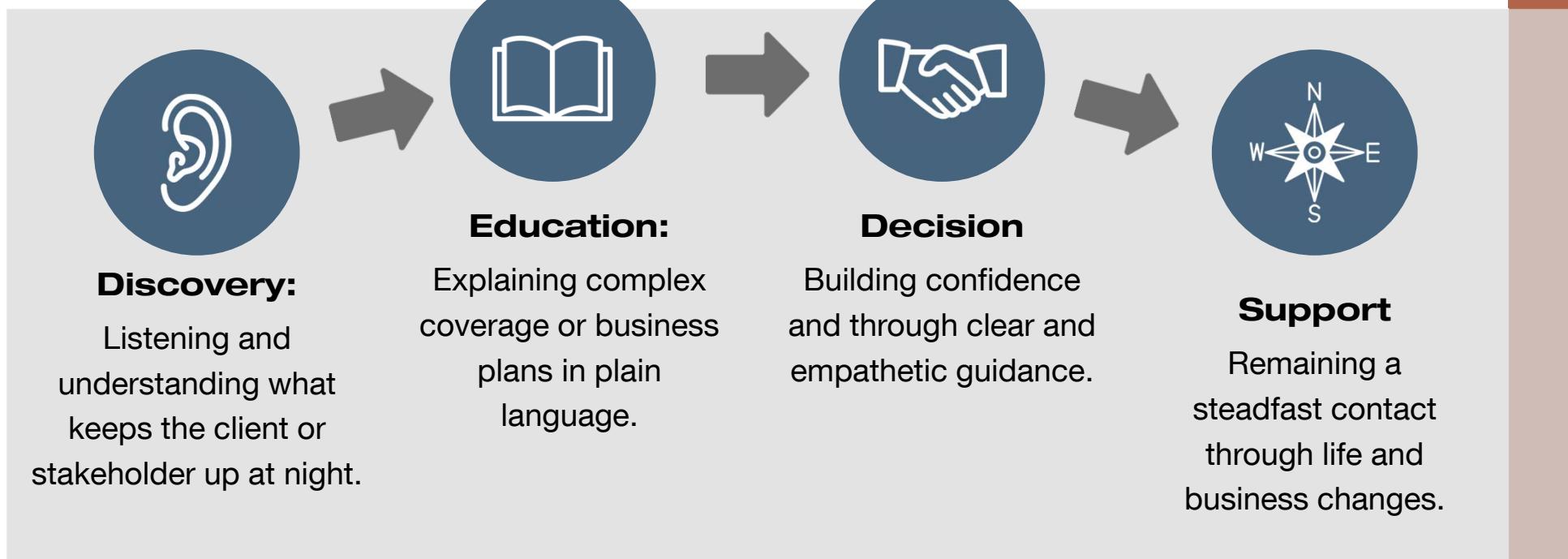
HIGHLIGHTS PORTFOLIO

Prepared for:



# THE RELATIONSHIP ARC

Evolution of long-term client and stakeholder relationships



**I've supported a diverse range of clients and colleagues by:**

- *Managing the lifecycle of high-net-worth insurance cases*
- *Implementing internal transitions with internal managers and business stakeholders*
- *Onboarding and integrating veteran business-owners in Mergers and Acquisitions cases.*
- *Guiding families and individuals through major life events where coverage, claims, and planning converge.*

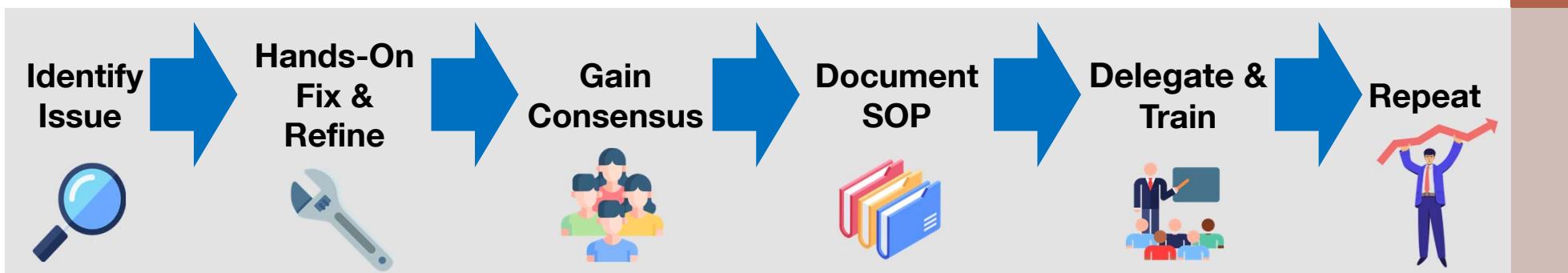


# OPERATIONS LEADERSHIP & PROCESS INNOVATION

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: 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

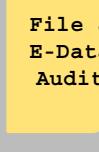
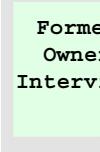
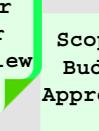
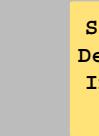
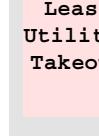
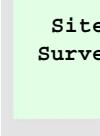
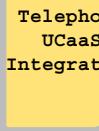
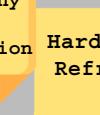
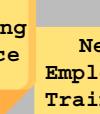
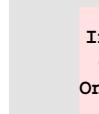
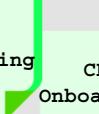
## From Strategy Sessions to On-Site Execution: Every Detail Covered

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.	

# 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

## FACILITIES AND PROPERTY MANAGEMENT

### Two Roles, One Mission: Balancing Ownership & Business Operations

*Most property managers focus on the building. Most operations managers focus on the business inside it. I did both, at the same time.*

*Managed both the physical assets and business operations for 6 properties personally owned by CEO and COO, balancing owner priorities with the needs of a fast-paced insurance operation.*

*Over the years, also directed daily operations, build-outs, moves, etc. for 20+ rented office locations, with a maximum of 13 offices in operation at once, ensuring real estate assets and the business were at their peak performance.*



Stamford CT: 5,000 sq ft  
Gut renovation, 15-employee cap.



Groton CT: 3,800 sq ft  
Plus two commercial tenants



Bantam CT: 2,900 sq ft  
Plus residential tenant



Cheshire CT: 4,000 sq ft,  
Full interior update, 20-employee cap.



Brooklyn CT: 2,000 sq ft  
Full interior update



Cheshire CT: 3,800 sq ft  
Plus commercial tenant

# LEADERSHIP, CREATIVITY & COMMUNITY ENGAGEMENT

Applying strategic thinking, technical expertise, and creativity

## Brighton Court Condo Association

President & Condominium Board Member

Led a 37-unit community as President, overseeing property management, major projects, and insurance challenges with transparency and collaboration.



## Community Bicycle Ride Organizer

Led musical group rides to promote healthy lifestyles and goodwill toward urban cycling



## Rippowam Labs Maker Space

Partner, facilities & training

Co-managed a creative workspace, teaching technical and craft skills while fostering collaboration.



## Music In the Park at Czescik Marina

Organizer, Publicity & Audio Tech

Helped revive a hidden public space through live music events, handling publicity, logistics, and sound engineering



# Let's Discuss How I Can Help Congruent Insurance Solutions 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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