



RONALD C. MORSE

HIGHLIGHTS PORTFOLIO

Prepared for:

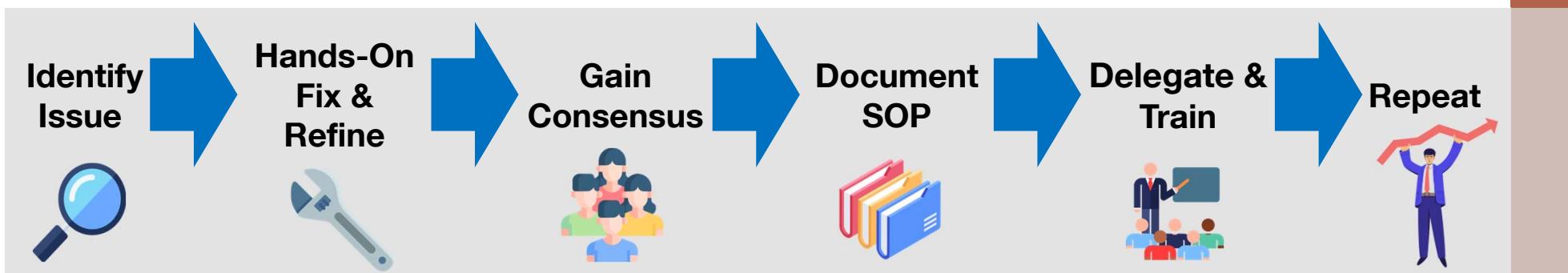


OPERATIONS LEADERSHIP & PROCESS INNOVATION

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: 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.



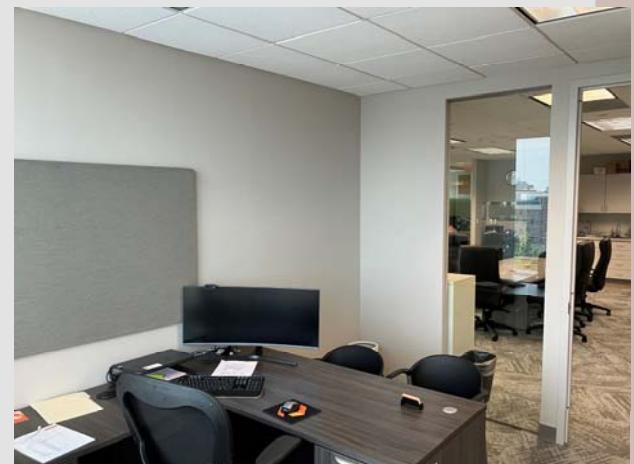
Executive Office



Branded Reception



Central Collaboration



Associate Offices

PROJECT SNAPSHOT: Stamford HQ Office Relocation (2025)

Role: Space Planning, Furniture Coordination, Vendor Oversight

Location: Stamford, CT

Scope: Full workspace programming, layout development, furniture integration, installation oversight

Overview:

Supported a full-office relocation by developing scaled floor plans, layout options, and furniture placement diagrams used for stakeholder review and vendor coordination. Integrated existing and new furniture, created clear move-day plans, and oversaw site readiness.

Key Responsibilities:

- Produced CAD plans, multiple layout iterations, and clear furniture placement diagrams
- Coordinated furniture vendor quotes, deliveries, installers, and sequencing
- Prepared the space for move-in, including reception, offices, and collaboration zones
- Communicated directly with leadership, contractors, and vendors

Outcome:

Delivered a right-sized, efficient workspace with zero downtime, improved functionality, and meaningful cost savings.



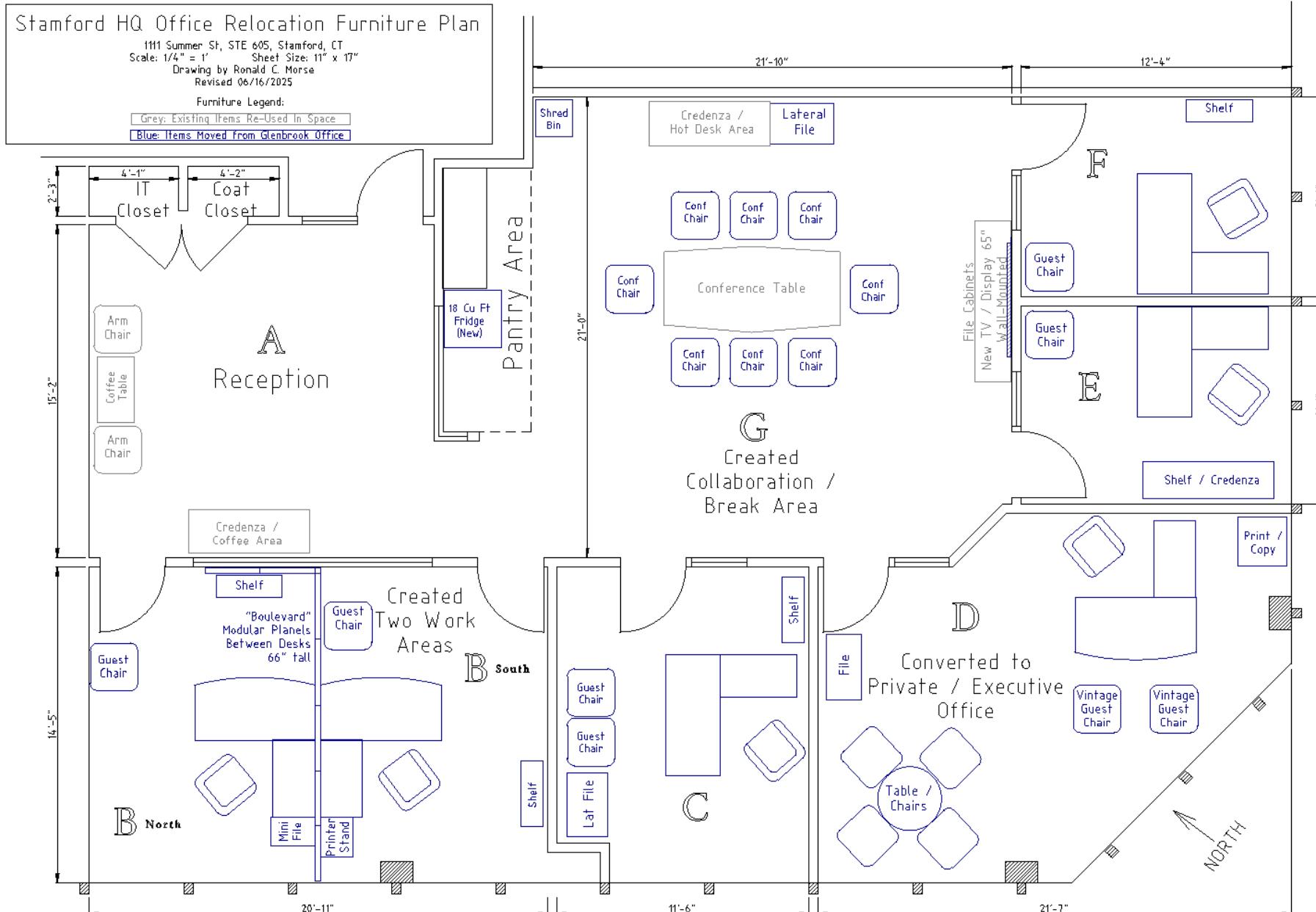
Reception Area



Central Collaboration

RELOCATION SPACE PLANNING – STAMFORD HQ OFFICE

Functional Facilities Layout Created for Build-Out Execution



Developed to coordinate furniture placement, circulation, IT/AV locations, storage, pantries, and collaboration zones as part of a zero-downtime Stamford office relocation.

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

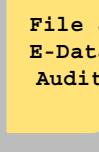
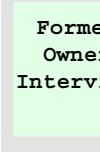
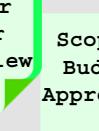
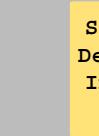
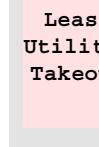
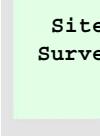
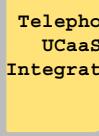
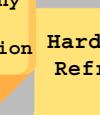
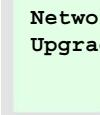
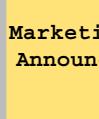
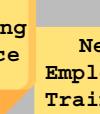
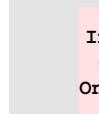
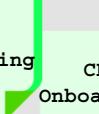
From Strategy Sessions to On-Site Execution: Every Detail Covered

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

Let's Discuss How I Can Help Your Client Succeed

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