



# RONALD C. MORSE

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## HIGHLIGHTS PORTFOLIO

Prepared for:



# THE RELATIONSHIP ARC

Evolution of long-term client and stakeholder relationships



## **Discovery:**

Listening and understanding what keeps the client or stakeholder up at night.



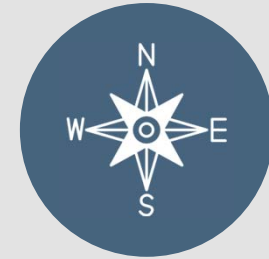
## **Education:**

Explaining complex coverage or business plans in plain language.



## **Decision**

Building confidence and through clear and empathetic guidance.



## **Support**

Remaining a steadfast contact through life and business changes.



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

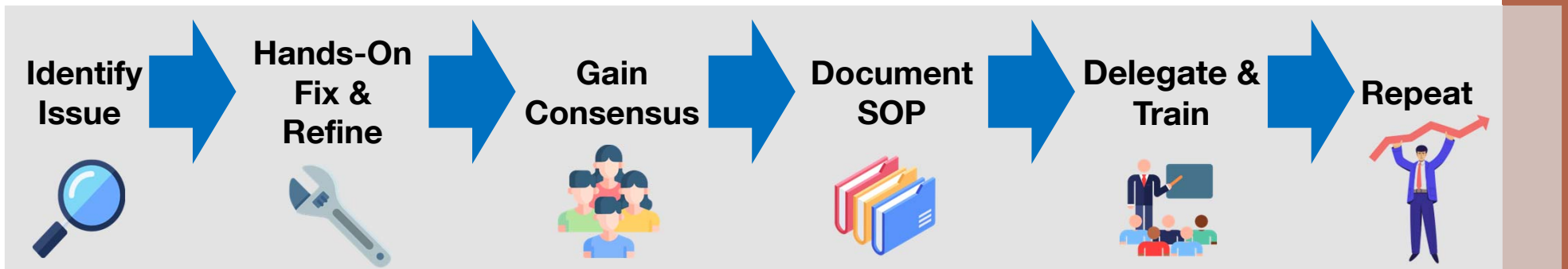
- *Managing the lifecycle of high-net-worth insurance cases*
- *Implementing internal transitions with internal managers and business stakeholders*
- *Onboarding and integrating veteran business-owners in Mergers and Acquisitions cases.*
- *Guiding families and individuals through major life events where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

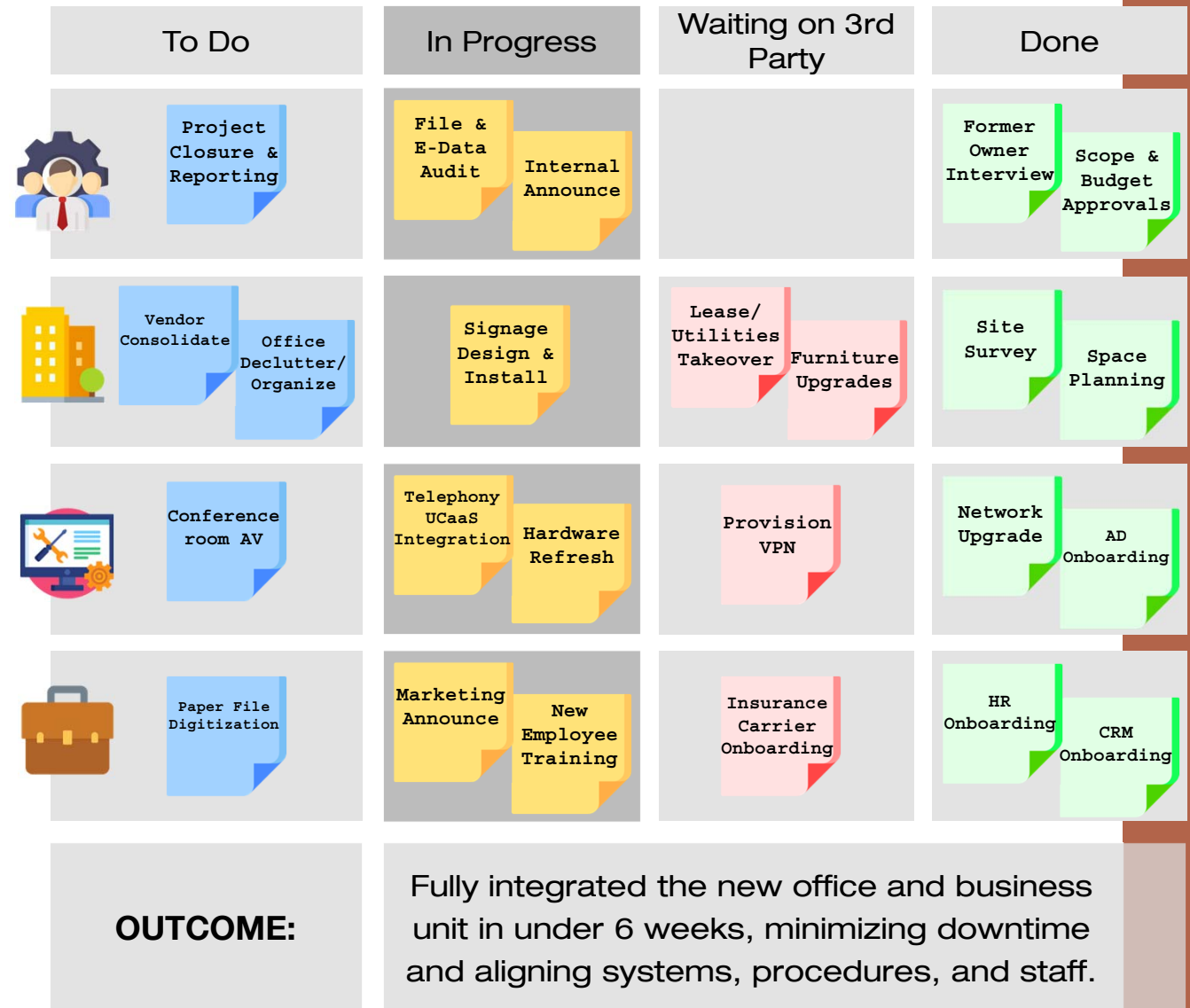
From Strategy Sessions to On-Site Execution: Every Detail Covered

*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:





# 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.



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



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



Brooklyn CT: 2,000 sq ft  
Full interior update



Bantam CT: 2,900 sq ft  
Plus residential tenant



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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