



# RONALD C. MORSE

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## HIGHLIGHTS PORTFOLIO

Prepared for:

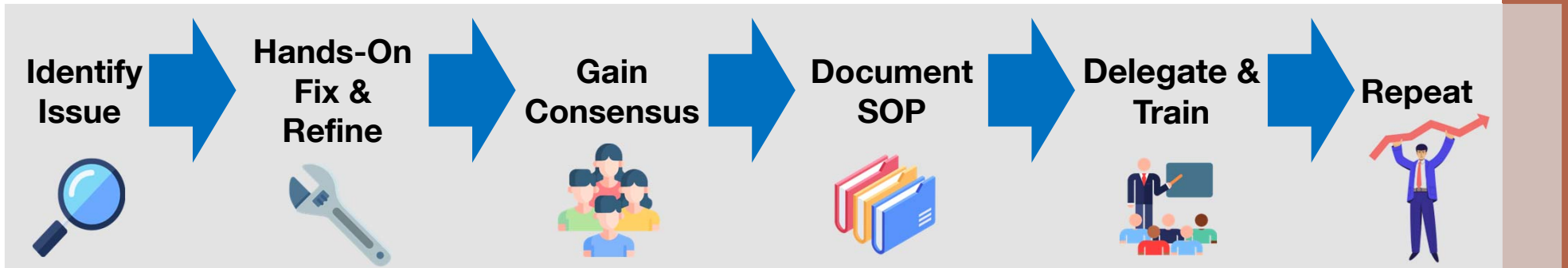


# STRATEGIC SYSTEMS & EXECUTION DISCIPLINE

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.***

# RAPID POST-ACQUISITION INTEGRATION

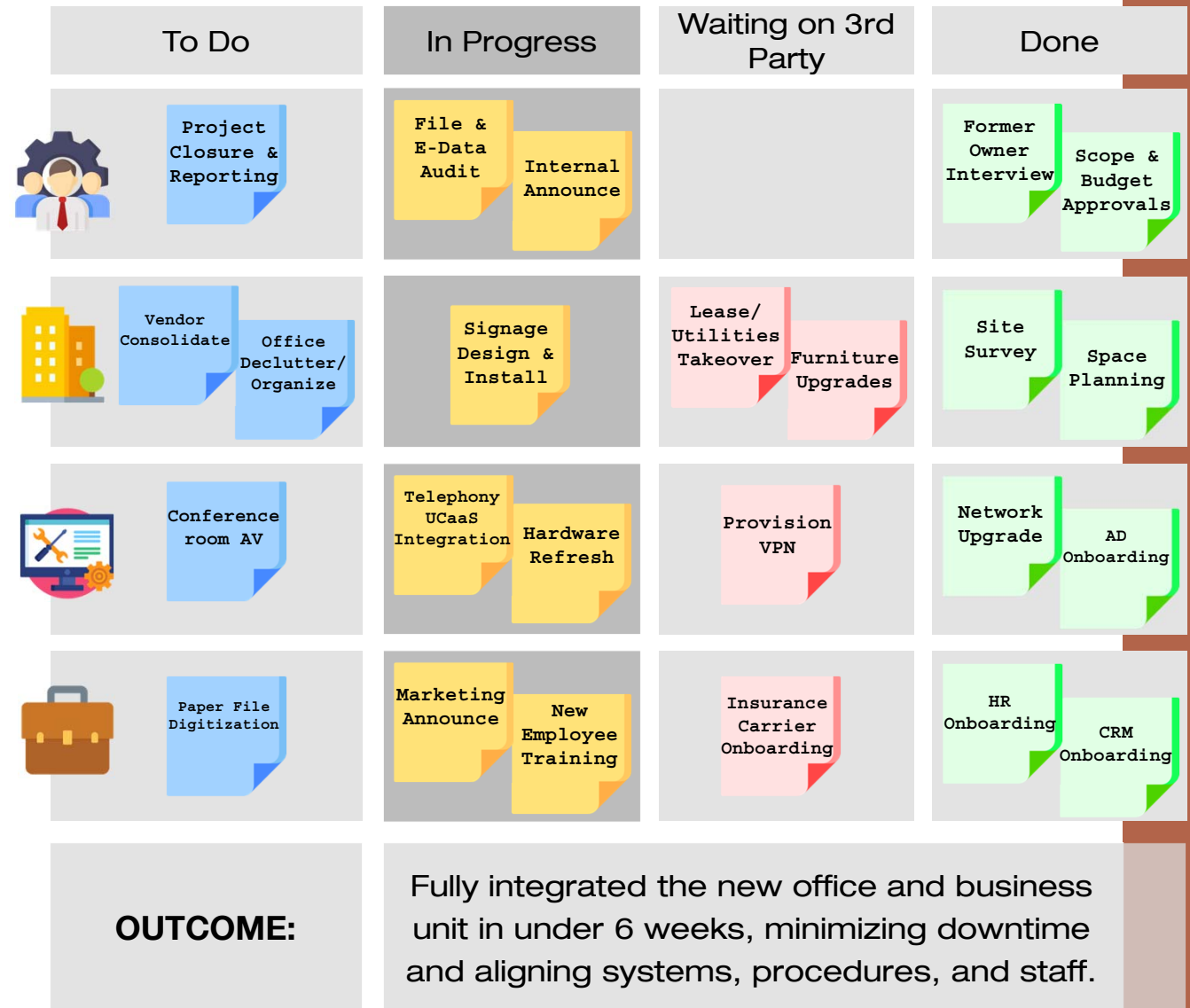
## From Strategy Sessions to On-Site Execution: Every Detail Covered

*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:



# ENTERPRISE COMMUNICATIONS STANDARDIZATION ACROSS 100 SITES

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



# EXECUTIVE OPERATIONS & LEADERSHIP ENABLEMENT

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

# ZERO-DOWNTIME STRATEGIC OFFICE RELOCATION

## 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.*



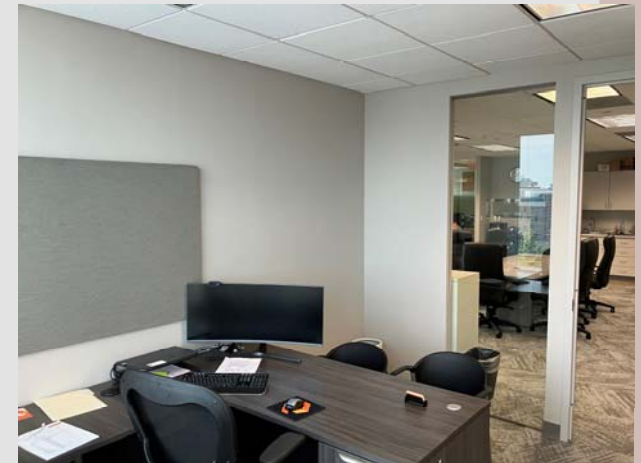
Executive Office



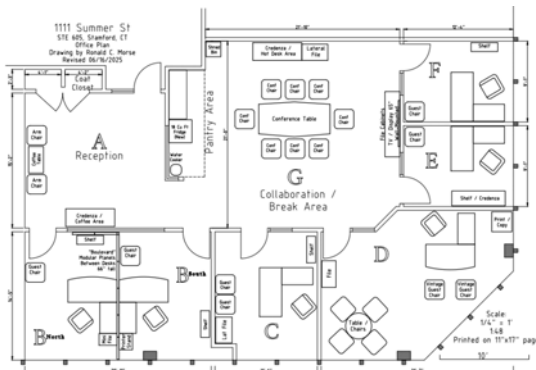
Branded Reception



Central Collaboration



Associate Offices



# Let's Discuss How I Can Help Your Client 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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