



# RONALD C. MORSE

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## HIGHLIGHTS PORTFOLIO

Prepared for:

**EXCEL**  
PARTNERS



# 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.

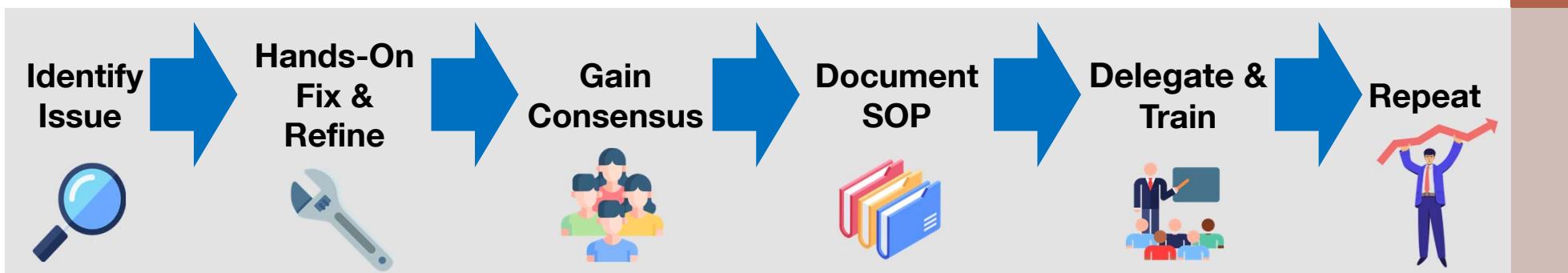
Brian E. Rogers  
CEO, Stamford Insurance Group

# 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.*



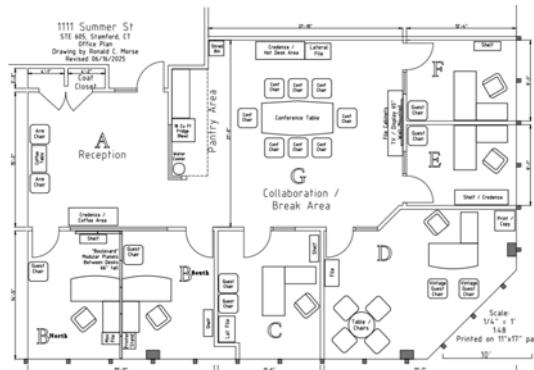
*This iterative approach enabled rapid, efficient scaling, strengthened cross-team collaboration, and freed leadership to focus on growth and strategy.*

# 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: M&A / OFFICE INTEGRATION - BROOKLYN CT

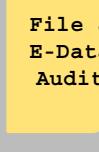
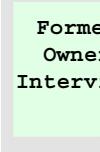
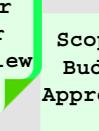
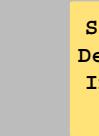
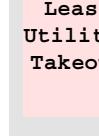
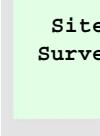
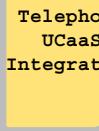
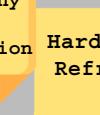
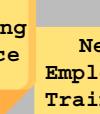
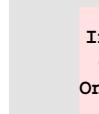
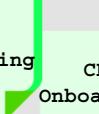
## From Strategy Sessions to On-Site Execution: Every Detail Covered

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.	

## 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

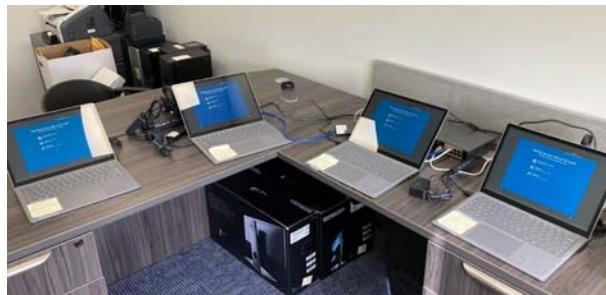
# WORKPLACE TECHNOLOGY & TEAM SUPPORT

## Keeping Teams Productive, Connected, and Supported

*Tech-savvy support partner trusted by leadership and staff for everything from daily troubleshooting to new-office setup.*

*Supported a 60+ person, 12-location organization by managing day-to-day technology needs, coordinating office IT setups, and ensuring employees had the tools, access, and training required to stay productive. Partnered closely with leadership to streamline workflows, onboard new employees, and support major office moves, migrations, and system rollouts.*

*Known for patience, clear communication, and the ability to turn complex issues into simple, reliable solutions for staff at every level.*



Quickly learns new applications and, more impressively, applies them effectively to streamline operations. His initiative in creating custom software solutions significantly improved internal workflows, and his ability to handle both high-level strategy and detailed execution is rare and valuable.

Brian E. Rogers  
VP, Relation Insurance  
CEO, Stamford Insurance Group

He was key to installations and training for new systems. He exhibited a great deal of patience as the tech support contact for over 65 employees.

Deborah Brosy  
Finance Director, Stamford Insurance Group

Ron's wealth of IT knowledge... made him an invaluable asset. Whether it was working behind the scenes to resolve issues, opening new offices, or setting up new employees for success.

Lisa Lingle  
External Growth Lead, Relation Insurance

# 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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