



Gregory Morris

Business Administration

Business administrator with seven years across operations, vendor management, and financial reporting for mid-market services firms. Comfortable owning a budget, running a cross-department project, and translating messy spreadsheets into decisions leaders can act on.

CONTACT INFORMATION



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EDUCATION

Bachelor of Science in Business Administration (Finance concentration), University of North Carolina at Charlotte, 2018

Lean Six Sigma Green Belt, 2022

KEY SKILLS

- Budgeting and variance analysis
- Vendor contract negotiation
- Dashboarding tools and advanced Excel (Power Query, pivot models)
- NetSuite, QuickBooks Online
- Process documentation and SOP writing
- Cross-functional project management
- KPI reporting for executives
- Salesforce administration (basic)

PROFESSIONAL EXPERIENCE

Business Operations Manager I 2021 - Present

Halverson Legal Services, Charlotte, NC

- Own a \$2.4M operating budget covering 6 practice groups; rebuilt the monthly close so partners see actuals by the 4th business day instead of the 12th.
- Renegotiated three vendor contracts (copy services, ediscovery, legal research) and trimmed annual spend by roughly 18% with no change in service levels.
- Led the rollout of a new time and billing platform for 47 attorneys and staff; ran training, migrated historical WIP, and kept collections stable through the switch.
- Sit in on quarterly business reviews with the managing partner and finance director, presenting utilization, realization, and A/R aging trends.

Operations Analyst I 2018 - 2021

Piedmont Wealth Advisors, Raleigh, NC

- Built the firm's first standing KPI dashboard, pulling from the CRM, custodian feeds, and the general ledger, used weekly by the executive team.
- Coordinated onboarding for 12 new advisors, including licensing paperwork, technology setup, and compliance training scheduling.
- Wrote and maintained the operations procedure manual; used as the primary reference during a state examination with no material findings.
- Handled expense reporting and corporate card reconciliation for a 60-person staff.