

Consulting Rate Card

Marshall Lee is a highly accomplished Workforce Management (WFM) executive and Customer Experience (CX) consultant with over 20 years of experience driving operational excellence, capacity planning, and customer loyalty across global enterprises. He serves as Director of Training and Senior Consultant at Human Numbers and is known for building scalable operating models that improve service performance, workforce efficiency, and customer outcomes.

Marshall's senior leadership experience includes Charitable Resource Foundation, Charter Communications, SHPS, Carewise Health, ADP, Firstsource Solutions, CVS Health, and most recently Director of Global Workforce Management at TTEC—where he led more than 300 WFM professionals supporting 12,000+ agents. He brings deep expertise in training development, business process improvement, software migrations, and professional coaching, and is recognized for advancing the WFM discipline through advisory board service with SWPP and QATC, as well as speaking and contributing for ICMI, SWPP, QATC, CrmXchange, and CCNG. He is also widely respected for championing diversity and inclusion.

1) Consulting Services

Service Category	Description
Program assessment	Current-state evaluation of WFM/CX programs, operating model, workflows, tooling, and performance drivers, with prioritized recommendations.
Organizational design	Role and responsibility mapping, governance, staffing models, and operating rhythms aligned to business goals and service strategy.
Training	Training strategy, curriculum design, facilitation, and enablement for contact center and back-office teams.
Process planning and documentation	Process discovery, standard work definition, documentation, and change management support to ensure consistent execution.
Build-operate-transfer consulting	Design and launch of programs and workflows, followed by stabilization and handoff to internal teams with knowledge transfer.

Full-scope WFM lifecycle consulting	End-to-end WFM support across forecasting, capacity planning, scheduling, intraday management, reporting, and continuous improvement.
Software selection	Requirements definition, vendor evaluation, demos, scoring, and implementation-readiness planning for WFM/CX tooling.
Support for organizations preparing to deploy or transition	Readiness assessment, cutover planning, stakeholder alignment, training, and stabilization support for new deployments or transitions.
Routing and skill mapping consolidation	Skill taxonomy and routing design, consolidation planning, and alignment of staffing to demand and service goals.
Workflow definition	Workflow mapping and definition, including handoffs, decision points, SLAs, and measurement to support consistency and scale.
WFM training	Role-based training for WFM practitioners and leaders, including forecasting, scheduling, intraday, and performance reporting.
Quality and training program evaluation	Evaluation of QA frameworks and training effectiveness, including calibration practices, metrics, and coaching workflows.
Training program basics	Foundational training program setup, including onboarding, reinforcement plans, and measurement of learner outcomes.
Quality program consulting	QA program design and improvement, including scorecard development, sampling strategy, governance, and performance coaching integration.

2) Pricing

Type	Scenario	Pricing Basis	Exact Amount	Rounded Amount (nearest \$25)
Hourly	Base hourly rate	Standard consulting rate	\$225.00/hr	\$225/hr
Hourly	15+ hours per week	25% reduction from base	\$168.75/hr	\$175/hr
Hourly	22+ hours per week	20% reduction from base	\$180.00/hr	\$175/hr
Weekly retainer	15-hour weekly block (6 weeks to 12 months)	70% of \$225.00/hr = \$157.50/hr; 15 hours per week = \$2,362.50/week	\$2,362.50/week	\$2,375/week
Weekly retainer	30-hour weekly block (6 weeks to 12 months)	65% of \$225.00/hr = \$146.25/hr; 30 hours per week = \$4,387.50/week	\$4,387.50/week	\$4,400/week

Payment note: Invoices are due on the first of the month following services. Retainers require 50% of the first month within seven days of signing.

3) Terms

Term	Detail
Currency	Rates are in USD.
Travel expenses	Travel expenses billed at actual cost.

Rate changes	Rates are subject to change with 30 days' notice.
Cancellations	Cancellations require 5 business days' notice to avoid charges.
Engagement status	Services are provided on an independent contractor basis.