



TrackThat[®]
ADVISOR

Three Engagement Peaks

Clarity at Every Elevation



Research & Education

Resource Center - Includes Monthly Articles, Publications, Videos, & Chat Bot

Data Storytelling Course (Online & Live Workshops)
\$6,000 per person/event

High Level Reporting



Data Tracking Platforms

TTA Seminars*

TTA Lite*

TTA Classic*

TTA 2.0*

*Pricing is \$250-\$800/month dependent on practice needs.

The Advisor Footprint
(A Salesforce Partner)
Inquire about pricing.



Services & Coaching

Monthly Coaching Subscription
One coaching & analysis call per month

TREK Reports
Upon request

Fractional Chief Data Analyst Services
6 month commitment, limited capacity



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Let's
Connect