



Data-Driven Insight Becomes More Critical for Brokers and Consultants in 2026

Data-driven analysis is helping consultants and brokers strengthen client trust and guide high-stakes decisions.

GRANVILLE, OH, UNITED STATES, January 6, 2026 /EINPresswire.com/ -- As organizations in the dental, medical, optometry, and veterinary industries prepare for growth and transition in 2026, lenders, healthcare real estate brokers, attorneys, and CPAs are playing an increasingly critical role in high-stakes business decisions. From acquisitions and valuations to site selection and multi-location expansion, these industry advisors are expected to guide clients with clarity, speed, and confidence—often under mounting competitive and financial pressure.

Locate Strategy, a provider of data-driven market analysis and strategic insights, notes that many advisors face a growing challenge: delivering recommendations that are not only persuasive, but also defensible. As markets become more complex, clients are asking advisors to support guidance with reliable data that clearly explains risk, opportunity, and long-term viability.

"In 2026, advisors are being held to a higher standard," said David James, CPA, founder of Locate Strategy. "Brokers and consultants who can ground their recommendations in objective analysis are better positioned to build trust and help clients move forward with confidence."

Industry advisors—including lenders, healthcare real estate brokers, attorneys, and CPAs—are increasingly involved across the full lifecycle of practice ownership. Common advisory use cases include practice start-ups, acquisitions, buy-ins, valuations, due diligence, competitive assessments, and multi-site growth planning. In each scenario, advisors must quickly assess market potential, competitive dynamics, and long-term sustainability while managing timelines, risk exposure, and client expectations.

Locate Strategy supports these professionals with research and data designed to strengthen and reinforce client recommendations. Its suite of studies—including The Market Study, The Location Study, The Competition Insights Study, The Patient Proximity Study, and The Multi-Site Study—provides advisors with a consistent analytical foundation they can apply across engagements. In addition, Locate Strategy delivers custom reports on demand, allowing partners to address unique client questions without building analysis from scratch.

For brokers and consultants, access to dependable data helps elevate conversations beyond

opinion and anecdote. Advisors can present insights that are objective, visual, and easy for clients to understand—reducing uncertainty and strengthening credibility throughout the decision-making process.

Behind each report is a team of experienced analysts and industry specialists who transform complex demographic, economic, and competitive data into clear, actionable insights. This combination of advanced analytics and human expertise allows advisors to focus on what they do best: guiding clients through informed, well-supported decisions.

“As we look ahead to 2026, the advisors who succeed will be those who pair experience with dependable data,” James added. “When brokers and consultants are empowered with the right insights, their clients—and their relationships—benefit.”

Locate Strategy will continue sharing insights throughout its 2026 planning series to support brokers, consultants, and industry partners advising clients through growth and transition.

About Locate Strategy

Locate Strategy LLC is an information services company that transforms complex market data into clear, actionable insights for organizations seeking to grow and operate more strategically. For over 16 years, Locate Strategy has supported brokers, consultants, and advisors—along with healthcare and other industry clients—through market analysis, competitive intelligence, expansion planning, and custom research. For more information, visit: locatestrategy.com

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