



Four Insights Fundraising Assessment

When fundraising, it's good to stop occasionally and assess how it's going. One way to do this is with the Four Insights Assessment. This strategy comes from Dave Ramsey's EntreLeadership training and is a straightforward method to analyze your fundraising, campaign, or any project you are working on.

The questions are: What Works? What's Broken? What's Confused? and What's Missing?

Start on a positive note.

Ask yourself: **What's currently working well with your fundraising?** Spend a minute or two jotting down everything that comes to mind. This could be anything from successful strategies to effective tools or even team dynamics yielding good results.

Next, shift your focus to what's not working.

List out **everything you feel is broken** within your fundraising. This is about getting all the issues out on paper and not worrying about order or priority.

1. What Works?	

2. What's Broken?	

The Bottom Line

Use these 4 Insights questions and take ten minutes to assess what works, what's broken, what's confused, and what's missing. Then, prioritize three areas you can take action on today.

Now, **analyze what's confusing with your fundraising**. It could be a muddled strategy, unclear communication within the team, or perhaps a need for more precise planning.

Finally, consider **what's missing**. Is there a gap in your strategy, a skill that needs to be developed, or a tool that could make a significant difference?

3. What's Confused?

4. What's Missing?

80/20 Question

After answering these questions individually or with your team, it's time to employ the 80/20 principle or Pareto Principle. 20% of inputs can often lead to 80% of the results. **Review your lists and identify the 20% of factors that, if improved, could resolve 80% of your issues.** Highlight or circle these items.

3 Action Steps

Based on your insights, jot down three actionable steps to take this week to improve your fundraising. These steps should target the critical areas you've identified and be practical enough to implement.

Action Steps

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2

3