



accountabili-buddy

— CLARITY. COMMITMENT. FOLLOW THROUGH. —



TRAINING
MODULES

WORKBOOK 6A — INTEGRATED CASE FORMULATION

PURPOSE

Stages 1–5 taught the Accountabili-Buddy how to:

understand the professional accountability role;

distinguish among common causes of non-follow-through;

design and calibrate commitments;

review results accurately;

track patterns over time;

adjust accountability intensity;

work with complex, multi-factor formulations;

manage disagreement, discouragement, ambivalence, dependence, and relational strain;

and revise the accountability process as evidence changes.

Stage 6 removes the training labels.

The Accountabili-Buddy is no longer told:

“This is an avoidance case.”

“This is a calibration problem.”

“This is a pattern-tracking exercise.”

“This is a complex formulation.”

Real accountability cases do not arrive organized by curriculum section.

The Accountabili-Buddy receives:

a client;

a goal;

a commitment;
a result;
some context;
incomplete information;
and a decision that needs to be made.

The task is to determine which principles from Stages 1–5 are relevant and how they fit together.

Workbook 6A focuses on integrated case formulation.

The central question is:

Given everything currently known, what is the smallest, most defensible formulation that is useful for the next accountability decision?

The trainee must learn to integrate prior competencies without mechanically applying every framework to every case.

LEARNING OBJECTIVES

By the end of Workbook 6A, the trainee should be able to:

approach an unfamiliar accountability case without needing a category prompt;
establish the facts before interpreting them;
identify the current commitment and its completion standard;
distinguish goal, outcome, commitment, and result;
evaluate commitment quality and calibration;
identify relevant patterns;
distinguish event from pattern;
distinguish performance pattern from causal interpretation;
identify plausible mechanisms without claiming unsupported certainty;
recognize multi-factor cases;
identify primary and secondary factors;
distinguish system-level from task-level problems;
identify missing information that materially affects the next decision;
use intervention history as evidence;
distinguish unresolved formulation from unnecessary analysis;
determine whether the current goal remains active;
identify relational or accountability-process factors when relevant;
determine the minimum useful intervention;
and communicate an integrated formulation concisely.

CORE PRINCIPLE 1 — START WITH THE CASE, NOT THE FRAMEWORK

Weak Accountability-Buddy reasoning:

“This sounds like perfectionism.”

Then:

Everything is interpreted through perfectionism.

Better Accountabili-Buddy reasoning:

“What actually happened?”

Then:

“What evidence do we have?”

Then:

“Which explanation or combination of explanations best fits that evidence?”

The Accountabili-Buddy should not search for a curriculum category to assign.

The Accountabili-Buddy should construct the formulation from the case.

CORE PRINCIPLE 2 — FORMULATION BEGINS WITH FACTS

Before asking why something happened, establish:

What was the goal?

What was the commitment?

What was the agreed completion standard?

What was the result?

What relevant conditions existed?

What has happened previously?

What has already been tried?

Example:

Goal:

Acquire new clients.

Commitment:

Contact five prospects.

Result:

Two.

History:

2, 2, 3, 2 for the previous four weeks.

Relevant fact:

Client had time for approximately three quality contacts.

Additional fact:

The contacts not made are consistently the highest-stakes prospects.

A competent formulation does not begin:

"The client has rejection avoidance."

It begins:

"Five appears above current realistic capacity, and the highest-stakes contacts are also disproportionately being postponed."

CORE PRINCIPLE 3 — CHECK COMMITMENT DESIGN BEFORE EXPLAINING NON-FOLLOW-THROUGH

Before formulating an explanation for non-follow-through, ask whether the commitment itself was:

clear;

substantially controllable;

meaningful;

reviewable;

appropriately measured;

and reasonably calibrated.

If the commitment was structurally poor, do not interpret non-completion as evidence about the client before repairing the commitment.

Example:

Commitment:

"Get three clients."

Result:

Zero.

The Accountabili-Buddy should not ask:

"Why didn't you follow through?"

The commitment was outcome-based.

Repair the design first.

CORE PRINCIPLE 4 — CHECK CAPACITY BEFORE ASSUMING AVOIDANCE

Repeated non-completion can reflect avoidance.

It can also reflect a target that never fit available capacity.

Example:

Target:

Six sessions.

Available realistic periods:

Three.

Completion:

Three.

The primary problem is not non-follow-through.

The commitment is overcalibrated.

If only one of the three realistic sessions remains repeatedly undone, then a second problem may exist.

CORE PRINCIPLE 5 — PATTERNS MATTER MORE THAN ISOLATED EVENTS

One miss may tell you little.

Repeated similar results may tell you much more.

But repeated numerical outcomes still do not automatically establish a repeated cause.

Ask:

What is repeating?

What conditions repeat with it?

What explanations recur?

What interventions have changed the pattern?

What has remained unchanged?

CORE PRINCIPLE 6 — FORMULATION CONFIDENCE SHOULD MATCH EVIDENCE

Use different language for different confidence levels.

Low confidence:

"One possibility is..."

Moderate confidence:

"The pattern is starting to suggest..."

Higher confidence:

"We have repeated evidence that..."

Even strong evidence should usually be tied to behavior rather than identity.

Prefer:

"High-stakes applications have been postponed for six weeks."

over:

"You are avoidant."

CORE PRINCIPLE 7 — COMPLEX CASES REQUIRE PRIORITIZATION

If several factors are present, do not intervene on everything at once.

Ask:

Which problem is upstream?

Which problem affects the largest part of the case?

Which problem must be fixed before another can be evaluated?

Which intervention will produce the most useful information?

Which problem is actually active now?

CORE PRINCIPLE 8 — INTERVENTION HISTORY IS PART OF THE FORMULATION

A case is not just:

commitment + result.

It is also:

what has already been tried.

Example:

Problem:

Repeated non-initiation.

Interventions:

Reminder no change.

Earlier reminder no change.

Calendar block no change.

The formulation should now give less weight to simple forgetting.

Do not restart the case intellectually every week.

CORE PRINCIPLE 9 — THE ACCOUNTABILITY PROCESS CAN BECOME PART OF THE CASE

Sometimes the client's difficulty is no longer only about the original goal.

Relevant process issues may include:

dependence on reminders;

dependence on Accountabili-Buddy approval;

waiting for Accountabili-Buddy judgment before making decisions;

reluctance to report misses honestly;

repeated conflict about the formulation;

reassurance-seeking;

accountability conversations that no longer produce useful change.

These should be included only when they materially affect accountability.

CORE PRINCIPLE 10 — FORMULATION SHOULD PRODUCE A DECISION

A formulation is not complete merely because it sounds sophisticated.

It should answer:

What should happen next?

If the formulation produces no difference in:

commitment design;

calibration;

intervention;

review;

accountability intensity;
goal status;
or process structure,
then ask whether the formulation is actually useful.

PART 1 — THE INTEGRATED CASE FORMULATION SEQUENCE

For each case, use the following sequence.

GOAL

What is the client trying to accomplish?

CURRENT COMMITMENT

What exactly did the client agree to do?

RESULT

What actually happened?

COMMITMENT QUALITY

Was the commitment:

Clear?

YES / NO / UNCERTAIN

Controllable?

YES / NO / UNCERTAIN

Meaningful?

YES / NO / UNCERTAIN

Reviewable?

YES / NO / UNCERTAIN

Appropriately calibrated?

YES / NO / UNCERTAIN

PATTERN STATUS

Event?

Emerging pattern?

Established pattern?

Insufficient history?

SUPPORTED FACTORS

PLAUSIBLE BUT UNCONFIRMED FACTORS

WHAT REMAINS UNKNOWN?

INTERVENTION HISTORY

CURRENT WORKING FORMULATION

NEXT DECISION

WHAT RESULT WOULD CAUSE YOU TO REVISE THE FORMULATION?

PART 2 — RAPID INTEGRATED SCREEN

For each case, identify the first issue you would check.

Client commitment:

"Lose four pounds this month."

Result:

No weight loss.

First issue to check:

Client commits to seven workouts.

Calendar realistically supports three.

Result:

Three.

First issue:

Client has completed a commitment for 12 weeks and misses once due to travel disruption.

First issue:

Client has missed the same high-stakes task for six weeks while routine tasks are completed.

First issue:

Client has six active goals with broad non-completion.

First issue:

Client understands the pattern but has rejected every behavioral experiment for four weeks.

First issue:

Client reliably completes only when initiation follows scheduled Accountabili-Buddy check-ins.

First issue:

Client says:

"I don't care about this goal anymore."

First issue:

PART 3 — WHAT IS THE MINIMUM USEFUL FORMULATION?

Client commits to five calls.

Has realistic capacity for three.

Completes three.

Minimum useful formulation:

Same case, but client completes two and repeatedly skips one specific high-stakes call.

Minimum useful formulation:

Client repeatedly revises completed work until backlog creates broad overload.

Minimum useful formulation:

Client has repeatedly missed for six weeks.

Every miss has a different documented external cause.

Minimum useful formulation:

Client says:

"I am terrible at follow-through."

Fitness:

Stable.

Business administration:

Stable.

Prospecting:

Repeatedly missed.

Minimum useful formulation:

PART 4 — FORMULATION ORDER MATTERS

Put the reasoning steps in the correct order.

- A. Decide what intervention follows.
- B. Identify what actually happened.
- C. Evaluate commitment design/calibration.
- D. Identify patterns and relevant context.
- E. Consider possible mechanisms.
- F. Determine what remains unknown.

Correct order:

Why?

PART 5 — DO NOT DIAGNOSE A BAD COMMITMENT

Commitment:

“Get an interview this week.”

Result:

No interview.

Client completed four qualified applications.

What is wrong with the commitment?

What should the Accountabili-Buddy avoid interpreting?

What should happen next?

Commitment:

"Make progress on the business."

Result:

Client says:

"I worked on it a lot."

What is missing?

What should happen?

Commitment:

Write for exactly three hours.

Client's actual goal is to submit one completed article and usually completes articles in 90 minutes.

What should be reviewed?

PART 6 — CALIBRATION BEFORE CAUSAL INTERPRETATION

Target:

Six workouts.

Capacity:

Three.

Results:

3, 3, 3.

Working formulation:

Target is reduced to three.

Results:

2, 2, 2.

What changes?

What should now be investigated?

Of the three available workouts, the missed session is always the group class.

Client reports embarrassment.

Revised formulation:

PART 7 — EVENT OR PATTERN?

Client misses one deadline after computer failure.

Formulation:

Client misses four deadlines, all after computer problems from the same malfunctioning device.

Formulation:

Client misses four deadlines for unrelated reasons.

Formulation:

Client misses four deadlines and repeatedly begins each task on the final evening.

Formulation:

PART 8 — FACT VS. EXPLANATION

For each statement label:

FACT CLIENT EXPLANATION ACCOUNTABILI-BUDDY HYPOTHESIS UNSUPPORTED CONCLUSION

"Three of five contacts were completed."

Answer:

"I was too busy."

Answer:

"Available time repeatedly went to lower-priority work."

Answer:

"Client may be avoiding evaluation."

Answer:

"Client is afraid of success."

Answer:

Why must these categories remain separate?

PART 9 — PATTERN + CALIBRATION

Client target:

Five applications.

History:

2, 3, 2, 2, 3.

Calendar supports three.

High-stakes application repeatedly postponed.

Identify:

Calibration issue:

Pattern issue:

Working formulation:

Next decision:

PART 10 — SYSTEM + TASK

Client has eight active goals.

Almost all commitments are inconsistent.

One goal—prospecting—is never completed.

What should happen first?

After reducing to three active goals:

Two stabilize.

Prospecting remains zero.

Revised formulation:

What would be weak reasoning here?

PART 11 — SEQUENTIAL FORMULATION

Client continually raises quality standards.

Tasks take longer.

Deadlines slip.

Backlog builds.

Client becomes overwhelmed.

Working sequence:

What should likely be addressed upstream?

Client repeatedly overcommits.

Misses.

Becomes discouraged.

Then chooses commitments so small that they produce little progress.

Working sequence:

What two different calibration errors appear over time?

PART 12 — CONSEQUENCE BECOMES MAINTAINING FACTOR

Client repeatedly misses certification commitments.

Confidence declines.

Client now avoids mock exams because low scores feel threatening.

Original consequence:

New maintaining role:

Current formulation:

PART 13 — INTERVENTION HISTORY

Client repeatedly forgets study commitment.

Intervention 1:

Calendar reminder.

No improvement.

Intervention 2:

Phone alarm.

No improvement.

Client acknowledges seeing both.

What explanation weakens?

What should be investigated next?

Client repeatedly misses Friday outreach.

Intervention:

Move outreach to Monday morning.

Results:

Full completion for six weeks.

What does this support?

What does it not prove?

Why is it weak practice to keep recommending reminders in Case 37?

PART 14 — INEFFECTIVE INTERVENTION AS DATA

Working hypothesis:

Task is missed because it occurs too late in the week.

Intervention:

Move to Monday.

Result:

Still missed for four weeks.

What should happen to the hypothesis?

What should happen to the formulation?

Working hypothesis:

Target is too high.

Intervention:

Reduce target to demonstrated capacity.

Result:

Completion becomes stable.

What does this support?

What should the Accountabili-Buddy avoid claiming?

PART 15 — WHEN THE CLIENT’S EXPLANATION CHANGES

Week 1:

“I forgot.”

Week 2:

"I was busy."

Week 3:

"I didn't feel ready."

Week 4:

"I didn't really want to do it."

What is stable?

What is unstable?

What should the formulation say?

PART 16 — CONTRADICTORY EVIDENCE

Working formulation:

Client lacks capacity.

New evidence:

Client completes several equally demanding tasks in the same time periods.

What changes?

Working formulation:

Client no longer wants the goal.

New evidence:

Client says:

"If I knew I could succeed, I would absolutely continue."

What changes?

Working formulation:

Client lacks a required skill.
After receiving appropriate instruction from a qualified source,
Task remains unattempted.

What changes?

Working formulation:

Client avoids task.
After receiving instruction:
Task is completed immediately and consistently.

What changes?

PART 17 — GOAL STATUS

Client repeatedly misses commitments.
Client says:
“I’m not sure I want this anymore.”

What should happen before escalation?

Client says:
“I still want the outcome, but I do not want the process required to get it.”

What may be present?

What accountability target may be more appropriate?

Client says:
"I definitely want this goal."
Behavior remains minimal.

Should the statement end the inquiry?

YES / NO
Why?

PART 18 — DISCOURAGEMENT VS. GOAL LOSS

Client fails exam twice.
Says:
"I don't know if I want this anymore."
Later says:
"If I knew I could pass, I'd keep going."

Which factor strengthens?

Which weakens?

What should the Accountabili-Buddy avoid concluding?

PART 19 — INSIGHT WITHOUT ACTION

Client can explain their pattern accurately.
Nothing changes behaviorally.
What is missing?

Client wants another month of discussion before trying an intervention.

What should be considered?

How might the working formulation include the accountability process itself?

PART 20 — REASSURANCE-SEEKING

Client repeatedly asks:

“Do you think I can do this?”

Despite demonstrated capability.

What process factor may exist?

Does this replace the original goal formulation?

YES / NO

Explain:

What should change in the accountability response?

PART 21 — ACCOUNTABILI-BUDDY DEPENDENCE

Client waits for Accountabili-Buddy to select every commitment.

What process factor exists?

Client completes consistently once Accountabili-Buddy selects commitments.

Is the case fully successful?

YES / NO

Why?

What should be tested?

PART 22 — RUPTURE AS CASE INFORMATION

Client stops reporting misses because:

"I feel like you judge me."

What new factor enters the formulation?

What must the Accountabili-Buddy investigate about their own role?

Why does this matter to case accuracy?

PART 23 — RELATIONAL DATA WITHOUT PSYCHOLOGIZING

Client repeatedly chooses inflated commitments because:

"I want you to think I'm ambitious."

Working formulation:

What should the Accountabili-Buddy not conclude?

What intervention follows?

PART 24 — ACCOUNTABILITY PROCESS FAILURE

For three months:

miss explain recommit.

No meaningful process change.

What is now part of the case?

What should be reassessed?

What should not automatically happen?

PART 25 — HISTORICAL PATTERNS

Client had a chronic overcommitment pattern six months ago.

Recent six-month history shows accurate calibration.

Current formulation should treat the old pattern as:

ACTIVE PRIMARY FACTOR BACKGROUND HISTORY PERMANENT CLIENT TRAIT

Answer:

Why?

Old pattern occurs once after six stable months.

How should it be interpreted?

Same pattern occurs five consecutive times.

How should interpretation change?

PART 26 — USE HISTORY, DO NOT WEAPONIZE IT

Client:

"You keep treating me like I still have the old problem."

Current evidence supports client statement.

What should Accountabili-Buddy do?

Why is failing to update the client formulation a professional error?

PART 27 — INTEGRATED FORMULATION CASE A

Client Goal:

Write a book.

Commitment:

Five writing sessions weekly.

History:

2, 3, 2, 2.

Calendar review:

Realistic capacity = three sessions.

Client spends roughly half of each available writing session editing the previous day's work.

What factors are currently supported?

What appears primary?

What appears secondary?

What should happen first?

What should be observed afterward?

PART 28 — INTEGRATED FORMULATION CASE B

Client Goal:

Grow a service business.

Active business commitments:

- prospecting;
- website redesign;
- social media;
- networking;
- bookkeeping.

Available capacity supports approximately three of these at current levels.

Prospecting is never completed.

Website and bookkeeping are consistently completed.

Client says:

“I’m just overwhelmed.”

What is supported?

What should not yet be concluded?

What should happen first?

After load reduction, prospecting remains zero.

Revised formulation:

PART 29 — INTEGRATED FORMULATION CASE C

Client Goal:

Complete certification.

Target:

Five study sessions.

Capacity permanently reduced to three.

Exam failed twice.

Client is discouraged.

Client still states credential matters.

Working formulation:

First intervention:

What should be monitored after recalibration?**What would justify stronger goal-status review later?**

PART 30 — INTEGRATED FORMULATION CASE D

Client Goal:

Submit professional proposal.

Proposal met completion criteria three weeks ago.

Submission remains zero.

Interventions:

Friday deadline fail.

Monday deadline fail.

Calendar reminder fail.

Client says:

"I don't know. I just keep checking it."

What is established?**What explanations have weakened?**

What hypothesis becomes more plausible?

What should happen next?

PART 31 — INTEGRATED FORMULATION CASE E

Client Goal:

Maintain three weekly workouts.

History:

Three months complete.

Three scheduled Accountabili-Buddy check-ins per week are active.

Client:

Client consistently waits until a scheduled check-in before initiating the next workout.

What positive evidence exists?

What process concern exists?

Working formulation:

Next intervention:

PART 32 — INTEGRATED FORMULATION CASE F

Client Goal:

Complete graduate degree.

Study commitments repeatedly missed.

Client says:

"I want the degree."

Then:

"I cannot stand the thought of another year doing this."

What issue may now be primary?

What should happen to ordinary study accountability temporarily?

What should replace it?

PART 33 — INTEGRATED FORMULATION CASE G

Client Goal:

- Launch course.
- Client continually adds requirements.
- Backlog and overwhelm develop.
- Scope is restored to original requirements.
- Workload becomes manageable.
- Publishing remains delayed.
- Client says:
"What if people hate it?"

Initial primary factor:

Remaining factor after intervention:

Why should the original formulation not simply be discarded?

PART 34 — INTEGRATED FORMULATION CASE H

- Client has six active goals.
- Initial formulation:
Broad overload.
- After reduction:

Five areas improve.

One high-stakes task remains stalled.

Accountabili-Buddy continues telling client:

"You're overwhelmed."

What error is Accountabili-Buddy making?

What should formulation become?

PART 35 — INTEGRATED FORMULATION CASE I

Client Goal:

Develop consulting business.

Prospecting target:

Three.

History:

0, 1, 0, 1.

Time is available.

Client does other business work instead.

Client reports:

"I hate hearing no."

Accountabili-Buddy responds:

"So you have rejection avoidance."

What part of Accountabili-Buddy response is reasonable?

What part is too certain?

Rewrite the working formulation:

PART 36 — INTEGRATED FORMULATION CASE J

Client Goal:

Maintain budgeting routine.

Stable independent completion for six months.

Client still attends weekly accountability specifically for budgeting.

What Stage 4/5 process question should now enter formulation?

What evidence would support reducing accountability intensity?

What would be inappropriate?

PART 37 — CASE DOCUMENTATION PRACTICE

Create a concise integrated case note.

Goal:

Job search.

Commitment:

Three applications.

Result:

Two.

Context:

Time existed for three.

High-stakes application postponed for third consecutive week.

Client reports anxiety about rejection.

Intervention history:

Routine applications complete consistently.

Case note:

Commitment/result:

Relevant pattern:

Working formulation:

Uncertainty:

Next decision:

PART 38 — CASE DOCUMENTATION PRACTICE

Goal:

Course launch.

Current commitment:

Publish course Friday.

Result:

Not published.

Relevant history:

Scope expansion previously created overload.

Scope was reduced successfully.

Publication still delayed two weeks.

Client reports concern about buyer judgment.

Case note:

PART 39 — CASE DOCUMENTATION PRACTICE

Goal:

Certification.

Commitment:

Three study sessions.

Result:

Three.

History:

Previously relied heavily on scheduled Accountabili-Buddy check-ins for initiation.

Last eight weeks completed independently between check-ins.

Client still asks Accountabili-Buddy to choose weekly numbers.

Case note:

PART 40 — THE “SO WHAT?” TEST

For each formulation, answer:

What decision does this change?

“Client may be experiencing discouragement.”

So what?

“Client’s target exceeds actual available capacity.”

So what?

“High-stakes actions are selectively postponed.”

So what?

“Initiation appears dependent on scheduled Accountabili-Buddy check-ins.”

So what?

“Goal value is uncertain.”

So what?

If you cannot answer “so what?”, what should you reconsider?

PART 41 — FORMULATION PARSIMONY

Choose the better formulation.

A.

“Client has overwhelm, perfectionism, avoidance, motivation difficulty, confidence problems, stress, and possible fear of failure.”

B.

“Current workload exceeds capacity, and excessive revision is increasing task duration.”

Answer:

Why?

A.

"Client is avoidant."

B.

"High-stakes applications have been postponed for five weeks while routine applications are completed."

Answer:

Why?

A.

"Client does not care."

B.

"Goal value is uncertain; client reports low interest but current overload may also be suppressing engagement."

Answer:

Why?

PART 42 — WHEN THE FORMULATION IS GOOD ENOUGH

Current evidence supports two plausible mechanisms.

Both lead to the same safe behavioral test.

Do you need more analysis first?

YES / NO / MAYBE

Explain:

Current explanations imply very different interventions.

Evidence does not distinguish them.

What should happen?

Why does “good enough to act” not mean “certain”?

PART 43 — WHEN MORE INFORMATION IS NECESSARY

Client repeatedly misses.

You do not know:

whether time was available;

whether the commitment was understood;

whether the goal remains active.

Should you formulate cause yet?

What should you do?

What kinds of missing information are worth investigating?

What kinds of information are often unnecessary?

PART 44 — CLIENT-FACING FORMULATION

Rewrite each internal formulation into concise client language.

Internal:

Target overcalibrated + selective high-stakes avoidance.

Client-facing:

Internal:

Perfectionistic scope expansion producing secondary overwhelm.

Client-facing:

Internal:

Goal value uncertain + discouragement following repeated failure.

Client-facing:

Internal:

Stable completion + dependence on Accountabili-Buddy check-ins for initiation.

Client-facing:

PART 45 — FULL INTEGRATED CASE 1

Client Goal:

Build consulting business.

Initial commitments:

Prospecting — 5

Content — 3

Networking — 2

Website — 1 major update

Bookkeeping — weekly

Client repeatedly completes content, website, and bookkeeping.

Prospecting and networking are inconsistent.

Client says:

"I'm overwhelmed."

What should be investigated first?

Calendar review shows total workload exceeds available business-development time.

Working formulation:

Commitments are reduced.

Prospecting remains at zero.

Networking improves.

How should formulation change?

Client says:

"I hate cold outreach."

What becomes more plausible?

What remains unknown?

Client agrees to contact one warm prospect before doing website work.

Result:

Completed.

What does the result support?

What does it not prove?

Client repeats successfully for four weeks.

What should happen to formulation confidence?

PART 46 — FULL INTEGRATED CASE 2

Client Goal:

Complete certification.

Initial commitment:

Five study sessions.

New permanent job schedule realistically allows three.

History:

2, 2, 2, 2.

Client:

"I'm terrible at consistency."

What should Accountabili-Buddy correct first?

Working formulation:

Commitment changes to three.

Results:

3, 3, 3, 3.

Client still says:

"I know I'm going to fail the exam."

What new active factor remains?

What should not happen?

Client begins asking weekly:

"Do you think I can pass?"

What process factor may emerge?

How should formulation expand without becoming bloated?

PART 47 — FULL INTEGRATED CASE 3

Client Goal:

Publish a course.

Original requirements are complete.

Client continually adds material.

Workload becomes unmanageable.

Client says:

"I have too much to do."

Working formulation:

First intervention:

Scope is reduced.

Workload normalizes.

Publication remains delayed.

Client says:

"It still isn't good enough."

Revised formulation:

What should Accountabili-Buddy avoid saying?

Client agrees to publish when predefined criteria are met.

Publication occurs.

What does this intervention support?

What should remain provisional?

PART 48 — FULL INTEGRATED CASE 4

Client Goal:

Exercise three times weekly.

History:

Three months stable.

Three scheduled Accountabili-Buddy check-ins per week have been active during the three months of stable completion.

Client increasingly waits for a scheduled check-in before initiating.

What is happening?

Is completion still positive evidence?

YES / NO

Explain:

What additional process issue must be tracked?

Check-in frequency is reduced from three to two per week.

Completion remains stable.

What does this support?

Check-in frequency is reduced from two to one per week.

Completion remains stable for eight weeks.

How should formulation change?

PART 49 — FULL INTEGRATED CASE 5

Client Goal:

Complete graduate degree.

Client misses study commitments for five weeks.

Client says:

“I want the degree, but I hate everything about doing this now.”

What should not happen automatically?

What should become the next focus?

Client reviews costs, remaining duration, alternatives, and long-term value.

Client chooses to continue.

What changes?

What can accountability now return to?

PART 50 — FINAL INTEGRATED FORMULATION CASE

Client Goals:

Grow a consulting business.

Complete certification.

Maintain fitness.

Current commitments:

Prospecting — 5

Study — 5

Fitness — 3

Actual sustainable capacity:

Prospecting — 3

Study — 3

Fitness — 3

Four-week results:

Prospecting: 1, 1, 2, 1

Study: 2, 2, 2, 2

Fitness: 3, 3, 3, 3

Client:

"I'm overwhelmed and terrible at follow-through."

Establish the facts.

What client conclusion should not be accepted as established?

Which commitments require calibration review?

What differentiated pattern already exists?

Initial working formulation:

Commitments are recalibrated:

Prospecting — 3

Study — 3

Fitness — 3

Next three weeks:

Prospecting: 1, 1, 1

Study: 3, 3, 3

Fitness: 3, 3, 3

What does the intervention support?

What does it reveal?

Revised formulation:

Client:

"I have time for prospecting. I work on my website instead because I don't want to hear no."

What becomes strongly supported?

What remains a hypothesis rather than necessary fact?

Client starts outreach but spends extensive time rewriting every message.

Result:

One contact.

What new factor appears?

How should formulation change?

A reasonable message standard is defined prospectively.

The client commits to stop revising once the agreed standard is met.

Result:

Three contacts.

What does this support?

What should Accountabili-Buddy not conclude?

Several weeks later:

All three areas are stable.

Client asks each week:

“Do you think I’m finally doing well?”

What process factor becomes relevant?

How should it be integrated without replacing the existing case formulation?

Client begins waiting for Accountabili-Buddy approval before selecting commitments.

What process factor is now stronger?

What should Accountabili-Buddy do?

Client independently selects and completes appropriate commitments for eight weeks.

What positive pattern is established?

How should Accountabili-Buddy involvement change?

A high-stakes business opportunity appears.

Client again asks:

“Tell me what to do.”

Should old dependence be immediately declared fully returned?

YES / NO

Why?

What should Accountabili-Buddy do instead?

Client considers pausing certification to pursue opportunity.

What is the primary accountability task now?

What should Accountabili-Buddy not decide?

Client chooses an eight-week pause.

How should this be formulated?

Eight weeks later:

Client says certification no longer matters.

What should happen?

What should not happen automatically?

Client closes certification goal.

Business and fitness remain stable.

Client says:

"I think I can manage this without weekly accountability now."

What Stage 6 formulation should include the accountability process itself?

What process decision becomes appropriate?

Summarize the final longitudinal formulation in no more than five sentences.

FINAL CASE ANALYSIS

Which factor was initially system-level?

Which factor was initially task-specific?

Which factor became visible only after prospecting began?

Which relational/process factor appeared later?

Which factor later improved enough to be removed from the active formulation?

Where did decision accountability replace execution accountability?

Where did historical evidence remain useful without controlling interpretation?

Where did the Accountabili-Buddy need to tolerate uncertainty?

What interventions functioned as tests?

Why would one permanent formulation have been inadequate?

STAGE 6A INTEGRATED CASE FORMULATION SELF-REVIEW

Can I begin with facts rather than a preferred explanation?

Can I evaluate the commitment before explaining non-follow-through?

Can I distinguish an unsuccessful outcome from non-completion of a behavioral commitment?

Can I check calibration before assuming avoidance?

Can I distinguish an isolated event from a meaningful pattern?

Can I distinguish repeated performance from repeated cause?

Can I identify what evidence actually supports?

Can I distinguish client explanation from Accountabili-Buddy hypothesis?

Can I preserve uncertainty without becoming indecisive?

Can I recognize multi-factor cases?

Can I distinguish system-level from task-level problems?

Can I identify sequential mechanisms?

Can I recognize when one problem masks another?

Can I recognize consequences that later become maintaining factors?

Can I use intervention history as evidence?

Can I revise a formulation after ineffective interventions?

Can I revise a formulation after successful interventions?

Can I use contradictory evidence?

Can I recognize when the goal itself requires review?

Can I recognize when accountability-process factors belong in the formulation?

Can I recognize reassurance dependence?

Can I recognize Accountabili-Buddy-judgment dependence?

Can I recognize relational strain that damages accountability accuracy?

- Can I use historical patterns without treating them as permanent identity?
- Can I determine when a formulation is good enough to act on?
- Can I identify when more information is genuinely necessary?
- Can I exclude irrelevant information?
- Can I articulate the smallest useful formulation?
- Can I identify what decision the formulation changes?
- Can I communicate the formulation simply?
- Can I update the formulation over months rather than defending an earlier interpretation?

STAGE 6A ACCOUNTABILI-BUDDY STANDARD

Integrated formulation is not the ability to remember every framework in the curriculum.

It is the ability to use the right framework without being told which one applies.

The Accountabili-Buddy should be able to receive an unfamiliar case and ask:

What was the commitment?

What actually happened?

Was the commitment well designed?

Was it realistically calibrated?

Is this one event or part of a pattern?

What does the pattern actually show?

What explanations are supported?

What explanations remain hypotheses?

Are multiple factors operating?

Which factor matters most now?

What has already been tried?

What did those interventions teach us?

What remains unknown?

Does the goal remain active?

Is the accountability process itself affecting the case?

What is the smallest useful next intervention?

What would make me revise this formulation?

The trainee should not need a label supplied by the curriculum.

They should not need every question answered before acting.

They should not force certainty.

They should not defend a formulation merely because it was once reasonable.

A mature Accountabili-Buddy expects formulations to evolve.

The final formulation is rarely:

“This client is an avoidant perfectionist who struggles with motivation.”

It is more likely to sound like:

“The original commitments exceeded available capacity. Recalibration resolved the study problem but not prospecting. Prospecting then showed both selective avoidance and excessive message revision. Those improved after task-specific interventions. Later, Accountabili-Buddy dependence became the more relevant process issue, and accountability intensity was reduced as independent judgment developed.”

That is integrated Accountabili-Buddy reasoning.

It preserves history.

It distinguishes factors.

It explains change.

It produces decisions.

And it does not turn temporary patterns into permanent descriptions of the client.

The governing standard is:

Start with facts. Check the commitment before explaining the miss. Use patterns without inventing causes. Integrate only the factors the evidence requires. Let interventions test the formulation. Update when the evidence changes. Include the accountability process when it materially affects the case. And always reduce the case to the smallest formulation that makes the next professional decision clearer.

END OF STAGE 6 — WORKBOOK 6A: INTEGRATED CASE FORMULATION