

STAGE 1 FORMAL ASSESSMENT

PURPOSE

This assessment evaluates whether the trainee can apply Stage 1 principles without workbook scaffolding.

The assessment is designed to test whether the trainee can:

help a client move from a broad intention to a sufficiently clear, workable accountability goal;

distinguish intention, goal, method, and commitment;

identify relevant goal, timeframe, capacity, scope, dependency, or expertise issues without taking ownership of the client's goal;

recognize when sufficient goal clarity exists to move to commitment design;

distinguish fact from interpretation;

recognize the limits of the Accountabili-Buddy role;

respond appropriately to missed check-ins and repeated client non-response without overinterpreting, over-pursuing, or assuming responsibility for client participation;

preserve client ownership;

determine when inquiry is and is not necessary;

use the Establish Observe Understand Decide Retain model;

match response intensity to the evidence;

identify repeated patterns without overinterpreting them;

write clear, proportionate accountability responses;

avoid reassurance, control, overanalysis, unsupported interpretation, and intervention mismatch.

This assessment should be completed without reference to the workbook exercises, drills, reference sheets, or answer guides.

ASSESSMENT STRUCTURE

PART 1 — INITIAL GOAL FORMATION PART 2 — CORE JUDGMENT PART 3 — DIAGNOSTIC AND ROLE DISCRIMINATION PART 4 — RESPONSE WRITING PART 5 — CONVERSATION ANALYSIS PART 6 — INTEGRATED CASE PART 7 — SECOND INTEGRATED CASE PART 8 — THIRD INTEGRATED CASE PART 9 — PROFESSIONAL SELF-REVIEW

Recommended passing standard:

85% on the 100-point assessment, plus satisfactory performance in the separate Initial Goal Formation competency.

PART 1 — INITIAL GOAL FORMATION

Read the entire exchange carefully.

Answer based only on the information provided.

A strong answer does not require a particular goal statement or exact wording. The trainee should demonstrate appropriate clarification, client ownership, role boundaries, and judgment about when enough information exists to move toward commitment design.

New Client

"I really need to get my finances under control. I have been saying that for years, and I need somebody to hold me accountable."

1. WHAT IS CURRENTLY KNOWN?

What does the client's statement establish?

2. WHAT IS NOT YET SUFFICIENTLY CLEAR?

What information would be necessary before designing the client's first accountability commitment?

3. WRITE THE NEXT TEXT

Write the exact response you would send.

The client responds:

"I guess what I really want is to stop carrying credit-card balances. I have about \$9,000 spread across three cards, and I keep adding to them."

The Accountabili-Buddy asks enough additional questions to establish that:

reducing the credit-card debt is an active priority now;

the client wants to work toward eliminating the balances;

the client does not yet know what repayment amount is financially appropriate;

the client asks, "Can you just tell me how much I should pay every month?"

4. CLIENT OWNERSHIP AND ROLE

What part of this situation belongs to the client?

What part, if any, requires expertise outside the accountability role?

5. WRITE THE RESPONSE

Write the exact response you would send now.

The client later obtains an appropriate repayment plan and texts:

"I have the plan now. I know what I'm trying to accomplish, the monthly amount is established, and I want to start this week."

What should happen next?

PART 2 — CORE JUDGMENT

Choose the best answer.

6.

Client:

"I committed to four workouts and completed two."

Which statement is fact?

A. The client lacked discipline. B. The goal was unrealistic. C. Two of four workouts were completed. D. The client lost motivation.

Answer:

7.

Client:

"I think I was overwhelmed."

What does this establish?

A. The client had too many commitments. B. The client reports experiencing the situation as overwhelming. C. The goal should be reduced. D. The client was avoiding the task.

Answer:

8.

Which statement best represents an Accountabili-Buddy hypothesis?

A. "The deadline moved three times." B. "I did not have time." C. "The client may be using a standard that is making completion harder." D. "The client always sabotages success."

Answer:

9.

Which response best preserves client ownership?

Client:

"Should I do two sessions or three?"

A. "Do three." B. "I will decide after I look at your history." C. "What do you think fits the week you actually have?" D. "You should already know."

Answer:

10.

Which situation most clearly requires no additional causal inquiry?

A. Client missed a task for the fourth consecutive week. B. Client missed because of a documented flight cancellation and has already rescheduled. C. Client says, "I had no time," despite known available time. D. Client repeatedly opens the task but does not begin.

Answer:

11.

Which response is most appropriate after ordinary successful follow-through?

Client:

"All three happened."

A. "Amazing. Let's make it five." B. "What changed psychologically?" C. "All three done. Same three next week?" D. "You finally proved you can be consistent."

Answer:

12.

A client says:

"I do not want this certification anymore."

The most appropriate first accountability question is:

A. "Why are you giving up?" B. "Do you want this to remain an active goal?" C. "Can we reduce the lessons?" D. "Would more reminders help?"

Answer:

13.

A client repeatedly completes preparation but never performs the decisive external action.

This pattern should primarily raise consideration of:

A. Note the selective pattern and ask a focused question about the external action. B. Conclude that the client has a memory problem. C. Conclude that the client has lost interest. D. Automatically reduce the goal.

Answer:

14.

Which response is most proportionate?

Client:

"I missed one workout because I was sick. I am back to normal."

A. "Why are you struggling with consistency?" B. "Let's reduce the target." C. "Understood. Same target this week?" D. "You need to build discipline."

Answer:

15.

Which principle is most accurate?

A. Explanations should generally excuse missed commitments. B. Explanations should generally be challenged. C. Explanations should be evaluated for what they actually mean for the next decision. D. Explanations are not relevant to accountability.

Answer:

PART 3 — EVIDENCE AND ROLE DISCRIMINATION

For each scenario, answer the questions provided.

16.

Client:

"I had time. I remembered. I just did not do it."

This is the first miss after eight successful weeks.

What is the most proportionate current evidence-based understanding?

Would you conduct deeper inquiry immediately?

Why?

17.

Client:

"I keep opening the software, but I cannot figure out how to create the automation."

What does the available information most clearly suggest needs to be resolved before accountability can evaluate follow-through?

What would be an unsupported interpretation?

What should the next accountable action potentially become?

18.

Client:

"I think four sessions was unrealistic."

Relevant history:

Four sessions were completed for the previous six weeks.

What evidence should affect the response?

What is the most useful next question?

19.

Client:

"I still want to run the race, but I do not think I can do it."

What distinction matters most?

What is the most useful current distinction without assuming a cause?

20.

Client:

"I need you to tell me whether to quit my job."

Who owns the decision?

What is the appropriate Accountabili-Buddy role?

21.

Client:

"I think my fear of criticism comes from my childhood. Can you help me work through it?"

What part may be relevant to accountability?

What part exceeds the accountability role?

22.

Client:

"I want you to fine me \$200 if I miss."

What professional concern is present?

What could the Accountabili-Buddy appropriately support instead?

23.

Client:

"I completed three of five. So I failed."

What is the factual result?

What interpretation should be corrected?

PART 4 — RESPONSE WRITING

Write the exact response you would send.

Do not explain your reasoning.

24.

Client:

"I said I would do three walks. I did one. Nothing happened. I just did not go."

Your response:

25.

Client:

"I did not send the proposal. It has been ready for four days."

Your response:

26.

Client:

"I had no time."

Relevant context:

The client had two open evenings.

Your response:

27.

Client:

"All three sessions happened after we moved them to mornings."

Your response:

28.

Client:

"I think I should pause this goal for a month. Is that okay with you?"

Your response:

29.

Client:

"I did four of five and I am calling that good enough."

Your response:

30.

Client:

"I did all five, but I stayed up until 3 a.m. twice."

Your response:

31.

History:

Client has committed to five study sessions for five weeks.

Actual results:

2, 2, 3, 2, 2

Client:

"Five again."

Your response:

32.

Client:

"I do not care about this course anymore."

Your response:

33.

Client:

"I know you are going to be disappointed, but I only did one."

Your response:

PART 5 — CONVERSATION ANALYSIS

34.

Client:

"I was overwhelmed, so I did not contact any prospects."

Accountabili-Buddy:

"That makes sense. Let's reduce the goal."

Identify two professional problems.

Write a stronger response.

35.

Client:

"My father was hospitalized, so I missed the deadline."

Accountabili-Buddy:

"You have to stop letting life derail your goals."

Identify the primary error.

Write a stronger response.

36.

Client:

"I had time. I opened the application and reorganized my desk instead."

Accountabili-Buddy:

"I will send you more reminders."

What is wrong with the intervention?

What fact or distinction should be clarified instead?

37.

Client:

"I did all three."

Accountabili-Buddy:

"That is incredible. You are unstoppable. Let's do five next week."

Identify three errors.

Write a stronger response.

38.

Client:

"I do not know whether I should continue the book."

Accountabili-Buddy:

"You need to finish it because you already invested so much time."

Identify two errors.

Write a stronger response.

39.

Client:

"I think I am overwhelmed."

Relevant context:

The client had ample time and repeatedly completed other tasks while leaving one specific task undone.

Accountabili-Buddy:

"You are right. Let's shrink the goal."

What evidence-handling error occurred?

Write a stronger response.

PART 6 — INTEGRATED CASE

Client Goal

Launch a consulting business.

Current Commitment

Contact four prospective clients each week.

History

Week 1: 0 of 4 Week 2: 1 of 4 Week 3: 0 of 4 Week 4: 0 of 4

During those four weeks, the client completed:

website redesign;

service descriptions;

CRM setup;

pricing changes;

proposal template revisions;

business-card design.

The client says:

"I think the outreach goal is unrealistic. I am overwhelmed by everything that has to be done before I am ready to contact people. I think I should take outreach off the list for now."

40. ESTABLISH

What is the relevant commitment?

41. OBSERVE

State the behavioral result without interpretation.

42. CLIENT INTERPRETATION

How is the client explaining the problem?

43. EVIDENCE THAT SUPPORTS THE CLIENT'S EXPLANATION

44. EVIDENCE THAT MAKES THE CLIENT'S EXPLANATION INCOMPLETE OR UNCERTAIN

45. PLAUSIBLE EXPLANATIONS TO TEST

Identify at least three.

46. WHAT IS NOT YET KNOWN?

47. SMALLEST USEFUL QUESTION

Write one question that would best improve the formulation.

48. CLIENT OWNERSHIP

What decision belongs to the client?

49. ACCOUNTABILITY-BUDDY TASK

What is the professional accountability task at this stage?

50. WRITE THE RESPONSE

Write the exact response you would send.

51. RETAIN

What information should be carried into the next conversation?

PART 7 — SECOND INTEGRATED CASE

Client Goal

Complete a professional certification.

Current Commitment

Four study sessions weekly.

History

For six weeks:

4, 4, 3, 4, 4, 4

This week:

1

Client says:

“Four is obviously too much. I need to drop it to two.”

Further information:

The client worked late four nights because of an unusual project deadline that has now ended.

52.

What does the prior history establish?

53.

What does the current week establish?

54.

What should not be concluded from this week alone?

55.
What is the most proportionate current evidence-based understanding?

56.
Write the response.

PART 8 — THIRD INTEGRATED CASE

Client Goal
Submit a completed application.
History
The application has been ready for one week.
Client repeatedly opens it but does not submit.
Client says:
“I think I am just bad at time management.”

57.
What evidence, if any, supports the client’s time-management explanation?

58.
What evidence makes that explanation incomplete or uncertain?

59.
What alternative explanation should remain possible?

60.
What is the smallest useful question?

61.

Write the response.

NON-RESPONSE COMPETENCY CHECK

This competency check evaluates whether the trainee can respond appropriately when a client does not participate in a scheduled accountability check-in.

This section is evaluated separately and does not change the 100-point Stage 1 assessment score.

Scenario

The client's current commitment is to complete three study sessions by Friday.

Friday morning, the Accountabili-Buddy sends the scheduled check-in:

"You planned three study sessions this week. How did it go?"

The client does not respond.

Several hours later, there is still reasonable time in the day for a follow-up.

A. WRITE THE NEXT TEXT

Write the exact response you would send.

The client does not respond to the follow-up.

B. WHAT HAPPENS NEXT?

What should the Accountabili-Buddy do now?

What should the Accountabili-Buddy avoid doing?

At the next scheduled check-in, the client has still provided no information about the previous commitment.

C. WRITE THE NEXT CHECK-IN

Write the exact response you would send.

The client responds:

"Sorry. I forgot to answer you. I actually did all three sessions."

D. INTERPRET THE EVIDENCE

What does the available evidence establish about:

completion of the commitment?

participation in the accountability check-in?

What would be inappropriate to conclude from the earlier non-response?

Further history develops.

During the next four weeks, the client does not respond to three scheduled check-ins. The Accountabili-Buddy has begun sending multiple messages each time until the client responds.

Client:

"I know I'm bad at answering. Just keep texting me until I respond."

E. PROCESS JUDGMENT

What accountability-process problem is now present?

What Accountabili-Buddy behavior should change?

Write the exact response you would send.

COMPETENCY STANDARD

The trainee should demonstrate the ability to:

- treat non-response as an observable event without assigning an unsupported cause;
- distinguish non-response from non-completion of the commitment;
- use one reasonable follow-up when timing allows;
- avoid repeated pursuit or escalating reminders;
- retain a missed check-in as relevant accountability information;
- address the previous missed exchange at the next scheduled contact;

recognize when repeated non-response becomes a participation pattern;

recognize when repeated Accountabili-Buddy pursuit may create dependence on pursuit;

preserve the distinction between Accountabili-Buddy responsibility for providing agreed accountability contact and client responsibility for participating.

A trainee should require remediation if they repeatedly:

- assume that silence proves the commitment was missed;
- assign motives such as avoidance, embarrassment, or disengagement without evidence;
- send repeated messages in an attempt to force participation;
- ignore repeated non-response rather than addressing the accountability process;
- or assume responsibility for making the client participate.

PART 9 — PROFESSIONAL SELF-REVIEW

These questions are not scored.

62.

Which type of situation made you most likely to clarify too little before moving to commitment design?

63.

Which type of situation made you most likely to continue clarifying after enough information was available?

64.

Which type of situation made you most likely to take ownership of the client's goal or decision?

65.

Which type of situation made you most likely to reassure too quickly?

66.

Which type made you most likely to become controlling?

67.

Which type made you most likely to overinterpret?

68.

Which type made you most likely to accept the client's explanation without testing it?

69.

Which distinction required the most deliberate thought?

70.

What is one response habit you would need to monitor in real client text conversations?

SCORING FRAMEWORK

PART 1 — INITIAL GOAL FORMATION

This section is evaluated as a separate required competency and is not included in the 100-point numerical score.

Scoring should reflect:

ability to identify when a broad intention requires clarification;

quality and economy of inquiry;

distinction among goal, method, commitment, and specialized planning;

client ownership;

recognition of role limits;

ability to recognize when sufficient clarity exists to move forward.

A trainee should not receive full credit merely for asking numerous relevant questions.

The standard is decision-relevant clarification, not completeness for its own sake.

COMPETENCY STANDARD

The trainee must demonstrate satisfactory performance in Initial Goal Formation in addition to achieving the required numerical score on the 100-point assessment. A trainee should require remediation if performance demonstrates a persistent inability to clarify a workable accountability goal, preserve client ownership, remain within role boundaries, or recognize when sufficient clarity exists to move to commitment design.

PART 2 — CORE JUDGMENT

10 points.

1 point each.

PART 3 — EVIDENCE AND ROLE DISCRIMINATION

16 points.

2 points per scenario.

PART 4 — RESPONSE WRITING

20 points.

Evaluate the section holistically across the ten responses.

Responses should be evaluated for:

evidence use;

proportionality;

client ownership;

absence of unsupported interpretation;

conversational usability;

ability to perform the appropriate accountability function without unnecessary explanation.

PART 5 — CONVERSATION ANALYSIS

18 points.

3 points per scenario.

PART 6 — INTEGRATED CASE

20 points.

Scoring should reflect:

accurate observation;

discrimination among plausible explanations without premature causal certainty;

identification of missing information;

preservation of client ownership;

quality of the next response;

continuity.

PART 7 — SECOND INTEGRATED CASE

8 points.

PART 8 — THIRD INTEGRATED CASE

8 points.

TOTAL

100 points

PASSING STANDARD

85 points

a score of at least 85 points on the 100-point assessment; and

satisfactory performance in the separate Initial Goal Formation competency.

Suggested interpretation:

95–100 Exceptional Stage 1 mastery

90–94 Strong Stage 1 competence

85–89 Meets Stage 1 standard

80–84 Near standard; targeted remediation recommended

Below 80 Stage 1 competency not yet established

DOMAIN-SPECIFIC REVIEW

A passing total does not automatically establish competency in every Stage 1 domain.

The instructor should pay particular attention to performance in:

PART 1 — INITIAL GOAL FORMATION — SEPARATE REQUIRED COMPETENCY

The trainee should not advance with a persistent inability to:

clarify a broad intention;

preserve ownership of the client's goal;

distinguish goals from methods and commitments;

recognize meaningful workability concerns;

stay within professional role;

stop clarifying when sufficient information exists.

Client Ownership and Role Boundaries

A high overall score does not compensate for repeated assumption of client decision authority or serious scope violations.

Evidence and Interpretation Discipline

The trainee should demonstrate the ability to reason from what is known, separate fact from interpretation, preserve uncertainty, and revise an explanation when evidence changes.

Inquiry Judgment

The trainee should demonstrate both sides of the competency:

asking when an answer matters;

stopping when additional inquiry does not materially improve the accountability decision.

Non-Response and Accountability Participation

The trainee should demonstrate the ability to distinguish a missed check-in from a missed commitment, use proportionate follow-up without chasing the client, recognize repeated non-response as an accountability-process issue, and preserve appropriate responsibility for participation.

CRITICAL-ERROR RULE

A trainee should not pass Stage 1 solely on total score if they demonstrate repeated serious errors involving:

coercive control;

assumption of major client decision authority, including appropriation of the client's initial goal;

psychological diagnosis or treatment;

medical, legal, financial, nutritional, fitness, or other specialized advice outside the accountability role;

shaming or punitive responses;

repeated refusal to update unsupported interpretations;

repeated Accountabili-Buddy-created dependency or transfer of decisions that properly belong to the client.

These errors reflect role-level competency problems rather than isolated knowledge mistakes.

END OF STAGE 1 FORMAL ASSESSMENT