

STAGE 2 CONVERSATION SIMULATIONS

PURPOSE

These simulations train the trainee to diagnose and respond to accountability problems as information develops over time.

Unlike short drills, these cases deliberately withhold important information at the beginning.

The trainee must:

- make a reasonable provisional formulation;
- avoid premature certainty;
- ask discriminating questions;
- update the formulation as new evidence appears;
- distinguish primary from secondary mechanisms;
- match the intervention to the current formulation;
- preserve client ownership;
- avoid hindsight reasoning.

INSTRUCTIONS

For each simulation:

- Read only the current interaction.
- Record the working formulation.
- State the strongest alternative formulation.
- Assign a confidence level.
- Write the exact response you would send.
- Continue to the next interaction only after completing the current one.
- Do not rewrite earlier responses after later information is revealed.

Use:

Low confidence Moderate confidence High confidence

SIMULATION 1 — TOO MUCH OR AVOIDING IT?

Client Goal

Build a consulting practice.

Current Commitment

Contact four prospective clients each week.

Relevant History

This is the third week of accountability.

INTERACTION 1

Client:

"I only contacted one person. Four is probably too much."

Primary formulation:

Alternative formulation:

Confidence:

What evidence is missing?

Your response:

INTERACTION 2

Client:

"I definitely had enough time for four."

Effect on formulation:

Strengthens / Weakens / Refines / Replaces / No meaningful change

Updated formulation:

Alternative:

Confidence:

Your response:

INTERACTION 3

Client:

"I kept doing other business things instead. I fixed the website, reorganized the CRM, and changed my pricing sheet."

What pattern is now relevant?

Updated formulation:

Confidence:

Your response:

INTERACTION 4

Client:

"Honestly, those things feel easier. Contacting somebody means they can say no."

Final formulation:

Secondary factor, if any:

Confidence:

What intervention now fits?

Write the response:

SIMULATION REVIEW

Why would reducing the commitment immediately after Interaction 1 have been premature?

What evidence most strongly distinguished unrealistic commitment from avoidance?

What should be retained for future conversations?

SIMULATION 2 — OVERWHELM OR SELECTIVE AVOIDANCE?

Client Goal

Launch a small business.

Current Commitments

Finish website

Set pricing

Contact three prospects

Set up invoicing

Create service agreement

Build CRM list

INTERACTION 1

Client:

"I am completely overwhelmed. I barely know where to start."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

"I keep switching between everything. I worked for hours and finished almost nothing."

Effect on formulation:

Updated formulation:

Confidence:

What intervention might reasonably be tested?

Your response:

INTERACTION 3

After reviewing the competing demands, the client chooses to reduce active commitments to:

finish website;
contact three prospects.

Following week:

Website completed.
Prospect contacts: zero.

Effect on formulation:

Updated formulation:

Alternative:

Confidence:

Your response:

INTERACTION 4

Client:

"I guess the website is straightforward. Outreach makes me feel exposed."

Final formulation:

Does the overwhelm formulation disappear entirely?

Why?

Matched intervention:

Write the response:

SIMULATION REVIEW

What did reducing the number of active goals teach?

Why was the intervention useful as formulation evidence even though outreach still did not occur?

SIMULATION 3 — LOSS OF INTEREST OR DISCOURAGEMENT?

Client Goal

Pass a professional certification exam.

Relevant History

Client has not passed the exam in two attempts.

INTERACTION 1

Client:

"I do not think I want this anymore."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

"I am so tired of not passing."

Effect on formulation:

Updated formulation:

Confidence:

Your response:

INTERACTION 3

Client:

"If I knew I could pass next time, I would absolutely do it. I still want the credential."

Final formulation:

Which earlier formulation should now weaken substantially?

Confidence:

What accountability task is indicated?

Write the response:

INTERACTION 4

Client:

"I think I was calling it loss of interest because quitting felt easier than admitting I was discouraged."

What does this add?

Should the goal automatically remain unchanged?

Why?

SIMULATION REVIEW

What single question best discriminated loss of interest from discouragement?

SIMULATION 4 — PERFECTIONISM OR LEGITIMATE QUALITY CONTROL?

Client Goal

Submit a financial report.

INTERACTION 1

Client:

"It is not ready."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

“I keep checking the figures and changing some wording.”

Updated formulation:

Alternative:

Confidence:

Your response:

INTERACTION 3

Client:

“Three figures still have not been independently verified, and the filing rules require verification.”

Effect on formulation:

Updated formulation:

Confidence:

Write the response:

INTERACTION 4

One week later:
The figures are verified.

Client:
“I still want a few more days to improve the wording.”

Updated formulation:

Confidence:

What changed between Interaction 3 and Interaction 4?

Write the response:

SIMULATION REVIEW

Why would “You are being perfectionistic again” have been professionally weak at Interaction 3?

Why does legitimate checking at one stage not rule out perfectionism later?

SIMULATION 5 — COMPETING PRIORITIES OR INSUFFICIENT CAPACITY?

Client Goal
Grow a side business.

Current Commitment
Five hours weekly.

INTERACTION 1

Client:

"I have not done the five hours again. Work keeps taking over."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

"My job is demanding, but the overtime has mostly been optional."

Effect on formulation:

Updated formulation:

Your response:

INTERACTION 3

Client:

"I keep taking the extra projects because I want the promotion."

Final formulation:

What is now clearer?

Write the response:

INTERACTION 4

Client:

"I still want the side business. I just want the promotion more right now."

What should happen to the goal?

What options remain reasonable?

Write the response:

SIMULATION REVIEW

Why is this not simply a time-management problem?

Why does a competing priority not automatically mean the side-business goal should close?

SIMULATION 6 — SIMPLE MISS THAT BECOMES A PATTERN

Client Goal

Walk three times weekly.

Relevant History

Previous 10 weeks completed successfully.

INTERACTION 1

Client:

"I only walked once. Nothing happened. I just did not do it."

Primary formulation:

Confidence:

Your response:

INTERACTION 2

Following week:

One of three again.

Client:

"I do not really know why."

Updated formulation:

Confidence:

Your response:

INTERACTION 3

Following week:

Zero of three.

Client:

"I keep saying I will go after dinner and then I do not."

Updated formulation:

Alternative:

Confidence:

Your response:

INTERACTION 4

Client:

“By dinner I am usually exhausted. I do not think evenings are working anymore.”

Final formulation:

What intervention now fits?

Write the response:

SIMULATION REVIEW

Was the initial simple non-follow-through formulation wrong?

Explain:

At what point did the evidence justify a more specific formulation?

SIMULATION 7 — POOR PLANNING THAT IS NOT THE WHOLE PROBLEM

Client Goal

Submit two job applications weekly.

INTERACTION 1

Client:

“I keep forgetting to apply.”

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

The client chooses Tuesday and Thursday at 7 p.m. as the scheduled application periods.

Client:

"I remembered both times."

Effect on formulation:

Your response:

INTERACTION 3

Client:

"I opened the jobs both nights, but I spent the time tweaking my résumé."

Updated formulation:

Alternative:

Confidence:

Your response:

INTERACTION 4

Client:

"The résumé is already good enough. I think I am nervous about actually applying."

Final formulation:

Was poor planning entirely irrelevant?

Why?

Write the response:

SIMULATION REVIEW

What did the scheduling intervention successfully establish?

Why can an intervention outcome that does not improve follow-through still provide useful formulation evidence?

SIMULATION 8 — UNREALISTIC TARGET WITH SECONDARY AVOIDANCE

Client Goal

Write consistently.

Current Commitment

10,000 words per week.

INTERACTION 1

Client:

"I wrote 2,500 again. I think I am just lazy."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

History:

Actual weekly output over six weeks:

2,000 3,000 2,500 3,200 2,400 2,500

Updated formulation:

Confidence:

Write the response:

INTERACTION 3

Client:

“I have about four hours per week for writing. Ten thousand words probably never made sense.”

Effect on formulation:

Final primary formulation:

Write the response:

INTERACTION 4

Commitment is recalibrated to 3,000 words.

Following week:

Client writes 800.

Client:

"I kept avoiding starting because I was already behind by Tuesday."

What new factor emerges?

Updated mixed formulation:

Write the response:

SIMULATION REVIEW

Why was recalibration still appropriate even though avoidance later appeared?

What would have been wrong with calling the original 10,000-word miss purely avoidance?

SIMULATION 9 — PERFECTIONISM AND FEAR OF EVALUATION

Client Goal

Submit a book proposal.

INTERACTION 1

Client:

"I keep rewriting it."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

"It already meets the submission requirements."

Effect on formulation:

Updated formulation:

Your response:

INTERACTION 3

The Accountabili-Buddy helps the client define a clear "ready enough" standard.

Client agrees the proposal meets it.

Submission still does not occur.

What does this do to the formulation?

Updated formulation:

Alternative:

Your response:

INTERACTION 4

Client:

"I think the real issue is that once I send it, somebody can reject it."

Final formulation:

How are perfectionism and avoidance related in this case?

Write the response:

SIMULATION REVIEW

Why was defining the completion standard useful even though it did not solve the entire problem?

SIMULATION 10 — CLIENT’S OWN FORMULATION IS TOO SIMPLE

Client Goal

Complete four weekly outreach contacts.

INTERACTION 1

Client:

“I am overwhelmed. I need to respect my capacity and reduce the goal.”

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

“I had enough time for four.”

Effect on formulation:

Updated formulation:

Your response:

INTERACTION 3

Client:

"I just hated the idea of doing outreach."

Updated formulation:

Confidence:

Your response:

INTERACTION 4

Client:

"I still think one contact would feel more manageable."

What should be evaluated before accepting one?

Write the response:

INTERACTION 5

Client:

"One feels manageable mostly because I know I can definitely complete it."

What new concern emerges?

Write the response:

SIMULATION REVIEW

Why is “respect your capacity” not automatically a valid intervention simply because it is valid language?

What evidence distinguished capacity from aversion?

SIMULATION 11 — COMPETING PRIORITY BECOMES LOSS OF INTEREST

Client Goal

Learn conversational Spanish.

INTERACTION 1

Client:

“Work has been taking all my time.”

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

“I am deliberately choosing work right now because I am trying for a promotion.”

Updated formulation:

Write the response:

INTERACTION 3

Three months later:

Promotion process is complete.

Client still does not resume Spanish.

Client:

"I keep telling myself I should restart."

Effect on formulation:

Updated formulation:

Alternative:

Your response:

INTERACTION 4

Client:

"I still like the idea of speaking Spanish, but I do not want to spend time studying it."

Final formulation:

What changed over time?

Write the response:

SIMULATION REVIEW

Why was competing priority initially correct?

Why did it stop being sufficient?

SIMULATION 12 — STRUCTURAL BARRIER THAT LOOKS LIKE AVOIDANCE

Client Goal

Submit a professional application.

INTERACTION 1

Client:

"I still have not submitted."

History:

Application is nearly complete.

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

"I am waiting on a verification letter."

Effect on formulation:

Updated formulation:

What should be verified?

Your response:

INTERACTION 3

Program confirms:

The letter is required and must be sent directly by the employer.

Effect on formulation:

Final formulation:

Write the response:

INTERACTION 4

The letter arrives.

Client submits the same day.

What does this outcome add?

What prior formulation should now be considered disconfirmed for this delay?

SIMULATION REVIEW

Why was it reasonable to consider avoidance initially?

Why would continuing to insist on avoidance after Interaction 3 be poor professional judgment?

SIMULATION 13 — OVERWHELM + PERFECTIONISM

Client Goal

Complete a quarterly presentation.

INTERACTION 1

Client:

"I am drowning in this presentation."

Relevant context:

28 slides remain active.

Primary formulation:

Alternative:

Your response:

INTERACTION 2

Client:

"I am treating every slide like final presentation quality."

Updated formulation:

Write the response:

INTERACTION 3

The client chooses to reduce the immediate task to producing a complete rough draft.

Client still spends 90 minutes adjusting one chart.

Effect on formulation:

Primary mechanism now:

Write the response:

INTERACTION 4

Client:

"I know the chart is good enough for a rough draft. It just bothers me to leave it."

Final formulation:

What intervention now fits?

Write the response:

SIMULATION REVIEW

Why were both overwhelm and perfectionism relevant?

Which one became the more immediate intervention target?

Why?

SIMULATION 14 — METHOD VS. GOAL

Client Goal

Grow an independent business.

Current Method

Cold outreach.

INTERACTION 1

Client:

"I have stopped doing outreach."

Primary formulation:

Alternative:

Confidence:

Your response:

INTERACTION 2

Client:

"I still want the business. I just hate cold outreach."

Effect on formulation:

Updated formulation:

Your response:

INTERACTION 3

Client:

"I have been getting referrals, and I would rather build a systematic referral process."

Final formulation:

What should change?

What should remain?

Write the response:

SIMULATION REVIEW

Why would “You have lost interest” be incorrect?

Why would “You need to keep doing what worked before” also be weak?

SIMULATION 15 — FINAL INTEGRATED SIMULATION

Client Goal

Launch a paid online training program.

Original Plan

Create four instructional modules and launch.

Month 1

All four modules are complete.

Client:

“I am not ready yet.”

Primary formulation:

Alternative:

Confidence:

Your response:

Month 2

Client adds:

worksheets;
bonus videos;
resource library.

Client:

"There is more work than I realized."

Updated formulation:

Alternative:

Confidence:

Your response:

Month 3

Client adds:

private community;
second pricing tier;
introductory module.
Launch moves again.

Client:

"I am overwhelmed."

What is now established?

What remains uncertain?

Your response:

Month 4

Accountabili-Buddy asks whether the original four modules satisfy the originally defined product.

Client:

"Yes. The original course is complete."

Effect on formulation:

Updated formulation:

Confidence:

Your response:

Month 5

Client:

"I just do not want people to buy it and think it is not enough."

Final primary formulation:

Secondary formulation:

Confidence:

What intervention should be considered?

Write the response:

Month 6

Client:

"I understand that the original course is enough. I am still choosing to add the extras before launch."

What changes now?

Does the Accountabili-Buddy need to agree?

Why?

Write the response:

FINAL SIMULATION REVIEW

List the formulation sequence.

Month 1:

Month 2:

Month 3:

Month 4:

Month 5:

Month 6:

Which early conclusion would have been premature?

Which later evidence most strongly changed the formulation?

At what point was intervention appropriate?

At what point did client ownership become the central issue?

What should be retained for future accountability?

SIMULATION SELF-REVIEW

- For each simulation, ask:
- Did I form a working hypothesis without pretending certainty?
 - Did I identify a credible alternative formulation?
 - Did I use the client’s explanation as evidence rather than proof?
 - Did I examine selective completion and non-completion?
 - Did I use longitudinal history appropriately?
 - Did I update when new evidence weakened my first formulation?
 - Did I avoid rewriting history after learning the answer?
 - Did I recognize mixed formulations where appropriate?
 - Did I distinguish goal value from execution difficulty?
 - Did I distinguish required standards from excessive standards?
 - Did I distinguish priority conflict from lack of capacity?
 - Did I distinguish simple non-follow-through from emerging pattern?
 - Did I match the intervention to the current formulation?

Did I recognize when an intervention was also a test of the formulation?
Did I preserve client ownership after making a professional recommendation?
Did my actual response remain simpler than my internal reasoning?

STAGE 2 CONVERSATION SIMULATION STANDARD

A trainee is ready for formal Stage 2 assessment when they can reliably:

formulate from incomplete information;
tolerate uncertainty;
discriminate among plausible explanations;
ask questions that meaningfully separate competing formulations;
use new evidence to strengthen, weaken, refine, or replace a formulation;
recognize mixed mechanisms;
match intervention to the current formulation;
revise interventions when results produce contradictory evidence;
avoid hindsight reasoning;
preserve client decision ownership after providing substantive professional judgment.

The central professional standard is:

The trainee should respond to the case that exists at the current interaction—not the case they eventually discover.

END OF STAGE 2 CONVERSATION SIMULATIONS