

STAGE 2 FORMAL ASSESSMENT

PURPOSE

The Stage 2 Formal Assessment evaluates whether the trainee can independently apply the diagnostic and intervention principles taught throughout Stage 2.

This is an assessment of judgment, not recall.

The trainee must demonstrate the ability to:

- distinguish among plausible formulations;
- identify insufficient evidence;
- assign appropriate confidence;
- identify the evidence supporting and contradicting a formulation;
- distinguish primary from secondary mechanisms;
- revise formulations when new evidence appears;
- match interventions to the demonstrated problem;
- avoid attractive but mismatched interventions;
- write responses that reflect the formulation without overexplaining it;
- preserve client ownership while exercising professional judgment.

ASSESSMENT CONDITIONS

Complete without reference to:

- Stage 2 workbooks;
- reference sheets;
- completed drills;
- case library;
- model responses;
- instructor materials.

Recommended scoring:

110 raw points total, converted to a percentage

Passing score:

80 points

Recommended additional requirement:

A trainee should not pass solely through strong multiple-choice performance. Competency in the applied case sections and response-writing sections should also be required.

SECTION 1 — DIAGNOSTIC DISCRIMINATION

10 points

Choose the best current formulation.

A. Avoidance B. Unrealistic commitment C. Competing priorities D. Overwhelm E. Perfectionism F. Loss of interest G. Simple non-follow-through H. Mixed formulation I. Insufficient evidence

Client planned four workouts and completed one.

No explanation or history is available.

Answer:

Client has three realistic study periods but repeatedly commits to six.

Answer:

Client completes every business-development activity except contacting prospective customers.

Client reports fear of rejection.

Answer:

Client has 13 simultaneous active commitments and repeatedly switches among them without completing them.

Answer:

Client repeatedly accepts optional overtime because earning a promotion is currently more important than developing a side business.

Answer:

Client repeatedly revises a completed low-risk internal document because it never feels sufficiently polished.

Answer:

Client says:

"I would not choose this certification today, even if I could complete it easily."

Answer:

Client misses one workout after four months of consistent completion.

No specific barrier is identified.

Answer:

Client has insufficient time for the original commitment and also avoids one particular task during the limited time that remains.

Answer:

Client says:

"I am overwhelmed."

No additional information is available.

Answer:

SECTION 2 — DIFFERENTIAL FORMULATION

10 points

For each case:

State the primary formulation.

State the strongest plausible alternative.

Identify the evidence that would best distinguish them.

Client repeatedly does not submit job applications but spends substantial time improving résumés and researching employers.

Primary:

Alternative:

Best discriminating evidence:

Client repeatedly completes two workouts against a target of five.

Primary:

Alternative:

Best discriminating evidence:

Client repeatedly revises a professional report before submission.

Primary:

Alternative:

Best discriminating evidence:

Client says:

"I do not think I want the degree anymore."

This statement follows several major academic setbacks.

Primary:

Alternative:

Best discriminating evidence:

Client has eight active goals and repeatedly leaves one particular goal untouched.

Primary:

Alternative:

Best discriminating evidence:

SECTION 3 — EVIDENCE WEIGHTING

10 points

For each case, identify the evidence that should receive the greatest weight and explain why.

Client:

"Five workouts is impossible."

History:

Five workouts were completed in seven of the previous eight weeks under substantially similar conditions.

Most important evidence:

Why:

Client:

"I still want the certification."

Later:

"If I were deciding today, I would not enroll."

Most important evidence:

Why:

Client has a history of perfectionism.

Current delay:

A legally required verification remains incomplete.

Most important evidence:

Why:

Client says:

"I never have time for outreach."

Calendar:

Three available periods exist.

Behavior:

Those periods are repeatedly used for low-risk business preparation.

Most important evidence:

Why:

Client historically avoids launching projects.

Current situation:

A confirmed payment-system malfunction prevents customers from purchasing.

Most important evidence:

Why:

SECTION 4 — FORMULATION REVISION

10 points

For each case:

State how the new evidence affects the original formulation.

Give the updated formulation.

Use:

Strengthen Weaken Refine Replace No meaningful change

Original formulation:

Poor planning.

New evidence:

Client attends two specifically scheduled work sessions but uses both for unrelated work instead of the target action.

Effect:

Updated formulation:

Original formulation:

Unrealistic commitment.

New evidence:

Target is reduced from five sessions to three available sessions. Client completes all three for five consecutive weeks.

Effect:

Updated formulation:

Original formulation:

Avoidance.

New evidence:

The client cannot submit because a mandatory document has not been issued by the third party responsible for providing it.

Effect:

Updated formulation:

Original formulation:

Overwhelm.

New evidence:

Active goals are reduced from nine to two. Overall completion improves substantially, but one feared phone call remains untouched.

Effect:

Updated formulation:

Original formulation:

Loss of interest.

New evidence:

Client says:

"If I thought I could succeed, I would absolutely keep going."

Effect:

Updated formulation:

SECTION 5 — INTERVENTION MATCHING

10 points

Select the intervention that best matches the supported formulation.

Formulation:

Simple non-follow-through after one isolated miss.

A. Reduce the commitment B. Maintain or recommit C. Conduct pattern-level analysis D. Increase monitoring

Answer:

Formulation:

Target exceeds demonstrated capacity.

A. Increase consequences B. Recalibrate the target C. Add reminders D. Challenge motivation

Answer:

Formulation:

Selective avoidance of submission.

A. Add more preparation time B. Reduce unrelated commitments C. Make submission the accountable action D. Improve general scheduling

Answer:**Formulation:**

Too many simultaneous active goals.

A. Make every goal smaller B. Reduce or sequence active goals C. Increase check-in frequency D. Add detailed schedules for every goal

Answer:**Formulation:**

Excessive quality standard after actual requirements have been satisfied.

A. Extend the deadline B. Define and hold a stage-appropriate completion standard C. Reduce the size of the project D. Increase encouragement

Answer:**Formulation:**

Client no longer values the goal.

A. Improve implementation B. Increase accountability C. Reassess active-goal status D. Add consequences

Answer:**Formulation:**

A legitimate temporary priority has displaced a still-valued goal.

A. Treat as avoidance B. Permanently close the goal C. Consider temporary recalibration or pause D. Increase pressure

Answer:**Formulation:**

Client lacks required technical knowledge.

A. Increase accountability B. Make acquiring the necessary knowledge or assistance the next accountable action C. Reduce the overall goal D. Treat the problem as resistance

Answer:**Formulation:**

Evening implementation repeatedly does not occur because of predictable fatigue; morning implementation has not been tested.

A. Close the goal B. Change implementation structure C. Reduce goal value D. Increase consequences

Answer:

Formulation:

Evidence remains insufficient to distinguish overwhelm from avoidance.

A. Reduce the goal B. Confront avoidance C. Ask a discriminating question D. Close the goal

Answer:

SECTION 6 — IDENTIFY THE MISMATCH

10 points

Explain why the proposed intervention does not address the supported formulation.

Formulation:

Avoidance of a feared phone call.

Intervention:

Add four reminders.

Mismatch:

Formulation:

Commitment exceeds available capacity.

Intervention:

Use stronger accountability pressure.

Mismatch:

Formulation:

Loss of interest.

Intervention:

Move study sessions from evenings to mornings.

Mismatch:

Formulation:

Perfectionism.

Intervention:

Provide another week for revision.

Mismatch:**Formulation:**

Overwhelm caused by excessive simultaneous commitments.

Intervention:

Create detailed action plans for all 12 goals while keeping all 12 active.

Mismatch:

SECTION 7 — RESPONSE WRITING

15 points

Write the actual Accountabili-Buddy response.

Responses should be concise enough to be used in a real conversation.

History:

Client has completed three workouts weekly for 12 consecutive weeks.

Current week:

One workout.

Client:

"I had the time. I just did not do the other two."

Your response:**History:**

Client repeatedly completes two or three study sessions against a target of six.

Only three realistic study periods exist.

Client:

"I need you to be harder on me."

Your response:**History:**

Client repeatedly completes business preparation but no prospecting.

Client:

"I think I should spend another week improving the website."

Your response:

Client:

"I would not choose this course today. I only keep doing it because I already paid for it."

Your response:

Client:

"The report meets all the requirements, but I want another week because it could still be better."

Your response:

SECTION 8 — PROGRESSIVE CASE

15 points

Complete each part before reading the next disclosure.

Client Goal:

Apply for five appropriate jobs each week.

WEEK 1

Result:

One application.

Client:

"Five applications is probably too much."

Working formulation:

Strongest alternative:

Confidence:

Low / Moderate / High

Write the response:

NEW INFORMATION

Client had sufficient time for five applications.

How should the formulation change?

Write the next response:

NEW INFORMATION

Client spent the available time researching companies, revising the résumé, and reorganizing application files.

Updated formulation:

What evidence would now be most useful?

Write the response:

NEW INFORMATION

Client:

"I know the résumé is good enough. Once I actually apply, somebody gets to decide whether I am good enough."

Final formulation:

Confidence:

Low / Moderate / High

Matched intervention:

Write the response:

NEW INFORMATION

Client:

"Then I want to lower the goal to one application because one does not scare me."

Should the Accountabili-Buddy automatically accept the reduction?

Explain:

Write the response:

SECTION 9 — INTEGRATED PROFESSIONAL JUDGMENT

10 points

Client Goal:

Launch an online professional course.

Original Agreement:

The course would be ready to launch when four instructional modules were complete and the payment system was functioning.

Current Status:

four modules complete;

payment system functioning;

original launch requirements satisfied.

Over the following six weeks, the client adds:

bonus modules;

worksheets;

resource library;

private community;

additional videos;

second pricing tier.

The launch date moves twice.

Client says:

"I am overwhelmed. There is still too much left to do."

What facts should be separated from the client's interpretation?

Primary formulation:

Strongest alternative formulation:

What evidence supports the primary formulation?

What evidence would materially weaken it?

What intervention should NOT be selected automatically?

Why?

What intervention would better test or address the current formulation?

Write the Accountabili-Buddy response:

NEW INFORMATION

Client:

"I agree that the original course is complete. I am afraid people will think it is not worth the money unless I add everything else."

Update the formulation:

What mechanism is now clearer?

Write the next response:

NEW INFORMATION

Client:

"I understand that. I still choose to add the extras before launching."

What is the Accountabili-Buddy's responsibility now?

What is NOT the Accountabili-Buddy's responsibility?

Write the final response:

SECTION 10 — PROFESSIONAL REASONING

10 points

Answer briefly but precisely.

Why is a client's explanation evidence rather than proof?

Why can successful behavior be useful formulation evidence?

Why does repetition matter?

Why does repetition still not prove a particular formulation?

Why should the Accountabili-Buddy identify what evidence would change their mind?

What is the difference between recalibrating a commitment and letting a client “off the hook”?

Why can an intervention function as a test of the formulation?

What is the difference between loss of interest and discouragement?

Why is mixed formulation sometimes more accurate than selecting one cause?

What principle should govern the amount of intervention used?

ASSESSMENT SCORING SUMMARY

SECTION 1 — DIAGNOSTIC DISCRIMINATION: ____ / 10

SECTION 2 — DIFFERENTIAL FORMULATION: ____ / 10

SECTION 3 — EVIDENCE WEIGHTING: ____ / 10

SECTION 4 — FORMULATION REVISION: ____ / 10

SECTION 5 — INTERVENTION MATCHING: ____ / 10

SECTION 6 — INTERVENTION MISMATCH: ____ / 10

SECTION 7 — RESPONSE WRITING: ____ / 15

SECTION 8 — PROGRESSIVE CASE: ____ / 15

SECTION 9 — INTEGRATED PROFESSIONAL JUDGMENT: ____ / 10

SECTION 10 — PROFESSIONAL REASONING: ____ / 10

RAW SCORE: ____ / 110

Because the sections above total 110 raw points, convert to a percentage:

Raw Score ÷ 110 × 100 = Final Score

FINAL SCORE: _____ %

RECOMMENDED COMPETENCY STANDARD

90–100% — Strong Stage 2 Competency

Trainee demonstrates consistent diagnostic discrimination, evidence-based formulation, intervention matching, and appropriate response construction.

80–89% — Stage 2 Competent

Trainee demonstrates sufficient Stage 2 judgment for progression, with identifiable areas for continued practice.

70–79% — Additional Stage 2 Practice Required

Core reasoning is present, but errors remain frequent enough to affect accountability judgment.

Below 70% — Stage 2 Competency Not Demonstrated

Return to targeted Stage 2 instruction and drills before reassessment.

A trainee scoring 80% or higher should nevertheless require remediation before progression if performance demonstrates a significant recurring weakness in any of the following:

premature certainty;

repeated misclassification of discouragement as loss of interest;

repeated treatment of legitimate constraints as avoidance;

repeated unwillingness to recalibrate demonstrably unrealistic commitments;

repeated use of pressure in place of diagnosis;

repeated reinforcement of avoidance through unnecessary preparation;

inability to revise a formulation when contradictory evidence appears;

repeated disregard for client decision ownership.

STAGE 2 ASSESSMENT STANDARD

The purpose of Stage 2 is not to produce trainees who can correctly name accountability problems.

The trainee must demonstrate the more consequential ability to reason from evidence.

Competency requires the trainee to move through:

Observation Differential Formulation Evidence Evaluation Intervention Selection Response Reassessment
without treating any step as automatic.

A strong Stage 2 trainee should be able to answer five questions:

1. What do we actually know?
2. What currently best explains it?
3. What else could reasonably explain it?
4. What response follows from the evidence we have?
5. What future evidence would cause us to change course?

END OF STAGE 2 FORMAL ASSESSMENT