

Next is Stage 2 Formulation Revision Drills.

ACCOUNTABILI-BUDDY TRAINING PROGRAM

STAGE 2 FORMULATION REVISION DRILLS

PURPOSE

These drills train the trainee to update a working formulation when new evidence appears.

The key professional skill is not merely choosing an initial explanation.

It is determining whether later information should:

confirm the formulation;

strengthen it;

weaken it;

refine it;

contradict it;

or leave it essentially unchanged.

A competent Accountabili-Buddy should be able to say:

“Given what we knew then, that was a reasonable formulation. Given what we know now, it needs to change.”

The trainee should not defend an interpretation simply because it was previously selected.

INSTRUCTIONS

For each case:

Read the initial evidence.

Record the working formulation and confidence level.

Read the new evidence.

Decide what effect the new evidence has.

Update the formulation only as much as the evidence requires.

Use the following update categories:

A. Strengthen B. Weaken C. Refine D. Replace E. No meaningful change F. Insufficient evidence to update

SECTION 1 — RAPID FORMULATION UPDATES

Initial formulation:

Poor planning.

New evidence:

The client schedules two specific work periods, appears for both, and spends both periods on unrelated tasks.

Update category:

Updated formulation:

Initial formulation:

Unrealistic commitment.

New evidence:

Client reduces from five sessions to three available periods and completes all three for four consecutive weeks.

Update category:

Updated formulation:

Initial formulation:

Avoidance.

New evidence:

A required third-party document is confirmed missing and submission is impossible without it.

Update category:

Updated formulation:

Initial formulation:

Overwhelm.

New evidence:

After active goals are reduced from eight to two, the client completes everything except the same one feared task.

Update category:

Updated formulation:

Initial formulation:

Perfectionism.

New evidence:

The client reveals that one required legal review has not yet been completed.

Update category:

Updated formulation:

Initial formulation:

Loss of interest.

New evidence:

Client says:

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

Update category:

Updated formulation:

Initial formulation:

Simple non-follow-through.

New evidence:

The same selective miss occurs for six consecutive weeks.

Update category:

Updated formulation:

Initial formulation:

Competing priorities.

New evidence:

The competing obligation ends, but the original task remains untouched for three more weeks.

Update category:

Updated formulation:

SECTION 2 — STRENGTHEN OR WEAKEN?

Choose:

A. Strengthens B. Weakens C. Neither materially

Formulation:

Avoidance.

New evidence:

The client repeatedly completes easier tasks during the same available periods.

Answer:

Formulation:

Avoidance.

New evidence:

The client genuinely lacks required access to the system.

Answer:

Formulation:

Unrealistic target.

New evidence:

The client completed the same target successfully for eight prior weeks under similar conditions.

Answer:

Formulation:

Unrealistic target.

New evidence:

The client's schedule consistently contains only half the required time.

Answer:

Formulation:

Perfectionism.

New evidence:

The task is a low-risk internal draft and the client has revised it nine times.

Answer:

Formulation:

Perfectionism.

New evidence:

Required data remains unverified.

Answer:

Formulation:

Loss of interest.

New evidence:

Client expresses relief at the idea of closing the goal.

Answer:

Formulation:

Loss of interest.

New evidence:

Client becomes upset at the possibility of losing the outcome and says the goal still matters deeply.

Answer:

SECTION 3 — REFINE, NOT REPLACE

For each case, the original formulation remains partly valid but is incomplete.

Write the refined formulation.

Initial:

Work demands reduced available time.

New evidence:

The client also avoided the task during one available evening.

Refined formulation:

Initial:

Overwhelm from too many goals.

New evidence:

Client also applies excessive standards to each remaining task.

Refined formulation:

Initial:

Perfectionistic standards delay submission.

New evidence:

Client also reports fear of external evaluation even after agreeing the quality standard is met.

Refined formulation:

Initial:

Unrealistic target.

New evidence:

The oversized target itself makes the client avoid beginning.

Refined formulation:

Initial:

Competing priorities.

New evidence:

The displaced goal is also becoming less important to the client.

Refined formulation:

SECTION 4 — DO NOT OVERUPDATE

History:

Client reliably exercises four times weekly for four months.

One week:

One session, due to travel.

Should the formulation change?

Why?

History:

Client has avoided submission for six weeks.

One week:

Submission is delayed by a confirmed system outage.

Should the historical avoidance formulation disappear entirely?

Explain:

History:

Client repeatedly overcommits.

One unusually productive week reaches the full target.

Should the calibration formulation be abandoned?

Why?

History:

Client reports no interest in a goal for two months.

One day:

Client says, "Maybe I still want it."

Should loss of interest be replaced immediately?

Why?

SECTION 5 — CLIENT AGREEMENT DOES NOT SETTLE THE FORMULATION

Current formulation:

Overwhelm.

Client says:

"Yes, that is definitely it."

What additional value does the client's agreement provide?

What does it not establish?

Current formulation:

Avoidance.

Client says:

"You are right. I am definitely avoiding."

What should still be evaluated?

Current formulation:

Unrealistic target.

Client agrees immediately after one unsuccessful week.

Why is historical evidence still necessary?

Current formulation:

Loss of interest.

Client says:

"Yes, I guess I don't care."

Why may this still require discrimination from discouragement?

SECTION 6 — CLIENT DISAGREEMENT DOES NOT SETTLE THE FORMULATION

Accountabili-Buddy formulation:

Possible preparation-based avoidance.

Client:

"No, this preparation is necessary."

What should happen next?

Accountabili-Buddy formulation:

Commitment appears unrealistic.

Client:

"No. I know I can do five."

What evidence should decide the issue?

Accountabili-Buddy formulation:

Perfectionistic standard may be delaying completion.

Client:

"I just care about quality."

What should be examined?

Accountabili-Buddy formulation:

Goal value may have changed.

Client:

"I am not a quitter."

What question remains?

SECTION 7 — INTERVENTION OUTCOME AS EVIDENCE

Hypothesis:

Evening fatigue.

Intervention:

Move sessions to mornings.

Outcome:

Completion improves from 1 of 3 to 3 of 3 for four weeks.

Effect on formulation:

Hypothesis:

Poor planning.

Intervention:

Protected work block.

Outcome:

Client shows up but repeatedly refuses the decisive action.

Effect on formulation:

Hypothesis:

Overwhelm.

Intervention:

Reduce active goals.

Outcome:

Global completion improves.

Effect on formulation:

Hypothesis:

Target too high.

Intervention:

Reduce target.

Outcome:

Client still completes only one despite three available periods.

Effect on formulation:

Hypothesis:

Perfectionism.

Intervention:

Define “ready enough.”

Outcome:

Client agrees standard is met but still does not submit.

Effect on formulation:

SECTION 8 — FORMULATION TRAJECTORIES

For each case, write the progression.

Week 1:

Client misses because of no scheduled time.

Initial formulation:

Week 2:

Specific schedule created; client attends but does unrelated work.

Updated formulation:

Week 3:

Client says the task makes them anxious because it involves rejection.

Final formulation:

Week 1:

Client says four workouts are unrealistic.

Initial formulation:

History reveals:

Four completed successfully for two months.

Updated formulation:

New evidence:

Current work schedule permanently changed and now allows only two exercise windows.

Final formulation:

Week 1:

Client says they no longer want certification.

Initial formulation:

New evidence:

Client says outcome still matters deeply but confidence collapsed after repeated unsuccessful outcomes.

Final formulation:

Week 1:

Client delays report because they are “still checking.”

Initial formulation:

New evidence:

Two required figures are genuinely missing.

Updated formulation:

Later:

Figures arrive, client continues checking unrelated wording for two weeks.

Final formulation:

SECTION 9 — CONFIDENCE UPDATES

Choose:

Low / Moderate / High

One selective miss.

Possible avoidance.

Confidence:

Four selective misses under available conditions.

Confidence:

Client explicitly reports fear of rejection and repeatedly performs substitute tasks instead.

Confidence:

Client historically overchecks, but current task has genuine accuracy requirements.

Confidence in perfectionism as explanation for current delay:

Client repeatedly says the goal no longer matters and would not choose it today.

Confidence in loss of interest:

SECTION 10 — WHAT WOULD MAKE YOU CHANGE YOUR MIND?

Current formulation:

Avoidance of outreach.

What evidence would support replacing it with unrealistic commitment?

Current formulation:

Overwhelm.

What evidence would support replacing it with selective avoidance?

Current formulation:

Loss of interest.

What evidence would support replacing it with discouragement?

Current formulation:

Perfectionism.

What evidence would support replacing it with legitimate quality control?

Current formulation:

Simple non-follow-through.

What evidence would support replacing it with a structural formulation?

SECTION 11 — PROGRESSIVE DISCLOSURE CASE 1

Client Goal:

Complete a job application.

INTERACTION 1

Client:

"I didn't get the application done. I had no time."

Working formulation:

Confidence:

What remains unknown?

NEW INFORMATION

Client had two free evenings.

Update category:

Updated formulation:

NEW INFORMATION

Client opened the application both evenings but spent the time rewriting the résumé.

Update category:

Updated formulation:

NEW INFORMATION

Client says:

"I know the résumé is good enough. I'm nervous about sending something and getting rejected."

Update category:

Final formulation:

Confidence:

SECTION 12 — PROGRESSIVE DISCLOSURE CASE 2

Client Goal:

Study four evenings weekly.

INTERACTION 1

Results:

1 of 4.

Client:

"Four is unrealistic."

Initial formulation:

Confidence:

NEW INFORMATION

Previous six weeks:

4, 4, 3, 4, 4, 4.

Update:

NEW INFORMATION

Current week included four late work nights due to an unusual deadline.

Update:**NEW INFORMATION**

Deadline ended Friday.

Final formulation:**Should the normal commitment change now?****Why?****SECTION 13 — PROGRESSIVE DISCLOSURE CASE 3****Client Goal:**

Complete a course.

INTERACTION 1**Client:**

"I'm not interested anymore."

Initial formulation:**Confidence:****NEW INFORMATION****Client says:**

"I'm just sick of failing."

Update:**NEW INFORMATION****Client says:**

"If I knew I could pass, I would absolutely want the certification."

Final formulation:

What original formulation should be abandoned?

SECTION 14 — PROGRESSIVE DISCLOSURE CASE 4

Client Goal:

Submit quarterly financial review.

INTERACTION 1

Client:

"It isn't ready."

Initial formulation:

Confidence:

NEW INFORMATION

Client has revised formatting and wording repeatedly.

Update:

NEW INFORMATION

Three financial figures remain unverified.

Update:

NEW INFORMATION

The three figures are verified. Client then delays another week changing fonts and wording.

Final formulation:

What does this case demonstrate?

SECTION 15 — PROGRESSIVE DISCLOSURE CASE 5

Client Goal:

Launch a consulting practice.

INTERACTION 1

Client:

"I'm overwhelmed. I cannot do outreach yet."

Initial formulation:

Confidence:

NEW INFORMATION

Client has 11 business-related tasks active simultaneously.

Update:

NEW INFORMATION

Client reduces active tasks to three after reviewing priorities with the Accountabili-Buddy.

Client completes two preparation tasks but not outreach.

Update:

NEW INFORMATION

Client says:

"Outreach is different because people can reject me."

Final formulation:

Is the earlier overwhelm formulation entirely wrong?

Explain:

SECTION 16 — WRONG FIRST FORMULATION

Initial formulation:

Avoidance.

New evidence proves the client was externally blocked.

What is the correct professional response to the earlier error?

Initial formulation:

Simple non-follow-through.

Later repetition reveals a clear task-specific pattern.

Was the first formulation necessarily wrong?

Explain:

Initial formulation:

Poor planning.

Scheduling intervention does not improve completion and reveals submission anxiety.

Was the planning intervention wasted?

Explain:

Why is “I knew it all along” poor professional reasoning after new evidence appears?

SECTION 17 — FORMULATION REVISION ERRORS

Accountabili-Buddy says:

“I already decided this is avoidance.”

Error:

Accountabili-Buddy changes the formulation completely after every new minor fact.

Error:

Accountabili-Buddy ignores six weeks of evidence because of one unusual successful week.

Error:

Accountabili-Buddy ignores strong current evidence because the client “has always been consistent.”

Error:

Accountabili-Buddy treats client agreement as proof.

Error:

Accountabili-Buddy treats client disagreement as proof of denial.

Error:

SECTION 18 — RETAIN, REFINE, OR REPLACE?

Choose:

A. Retain B. Refine C. Replace

Initial:

Competing priorities.

New evidence:

The competing priority is real, but avoidance also occurs during remaining time.

Answer:

Initial:

Perfectionism.

New evidence:

Task is actually incomplete because required data is missing.

Answer:

Initial:

Overwhelm.

New evidence:

Reducing active tasks resolves the problem completely.

Answer:

Initial:

Loss of interest.

New evidence:

Client still strongly wants outcome but has lost confidence.

Answer:

Initial:

Simple non-follow-through.

New evidence:

No repetition; next four weeks are normal.

Answer:

Initial:

Avoidance.

New evidence:

Client continues avoidance but target is also objectively too large.

Answer:

SECTION 19 — ADVANCED MIXED REVISION

Initial:

Unrealistic target.

Intervention:

Reduce target.

New evidence:

Client now reliably completes it but makes no meaningful progress because reduction was extreme.

How should the formulation/intervention be refined?**Initial:**

Overwhelm.

Intervention:

Reduce active goals.

New evidence:

Client becomes productive except on one high-stakes submission.

Updated formulation:**Initial:**

Perfectionism.

Intervention:

Define appropriate quality standard.

New evidence:

Client accepts the standard but still avoids external release.

Updated formulation:**Initial:**

Competing priorities.

New evidence:

The supposedly competing priority is optional and repeatedly chosen because it is more comfortable.

Updated formulation:

SECTION 20 — FINAL FORMULATION REVISION CASE

Client Goal:

Launch a professional training course.

Initial Scope:

Four modules.

Week 1

All four modules are complete.

Client says:

"I'm not ready to launch yet."

Initial formulation:

Confidence:

Week 2

Client adds worksheets and bonus lessons.

Updated formulation:

Week 3

Client adds a resource library and rewrites several completed lessons.

Updated formulation:

Week 4

Client says:

"I'm overwhelmed. There is too much left."

Updated formulation:

Week 5

Accountabili-Buddy asks whether the original four-module product meets the stated launch requirements.

Client says:

"Yes. It does."

Effect on formulation:

Week 6

Client says:

"I still don't want people seeing it until it feels more complete."

Final formulation:

Alternative formulation still plausible:

Confidence:

Low / Moderate / High

What evidence most changed the case?

What evidence would still make you revise the final formulation?

FORMULATION REVISION SELF-REVIEW

- Do I become attached to my first formulation?
- Do I revise too quickly based on weak evidence?
- Do I distinguish strengthening from proving?
- Do I distinguish weakening from disproving?
- Can I preserve part of an old formulation while adding a new mechanism?
- Do I use intervention outcomes as evidence?
- Do I distinguish historical patterns from current causes?
- Do I know what evidence would make me change my mind?
- Do I openly correct a prior formulation when necessary?

STAGE 2 FORMULATION REVISION STANDARD

- A trainee is ready to progress when they can reliably:
- form a provisional explanation from incomplete evidence;
 - assign an appropriate confidence level;
 - distinguish confirming from disconfirming evidence;
 - strengthen a formulation without overstating certainty;
 - weaken a formulation without abandoning it unnecessarily;
 - refine mixed formulations;
 - replace explanations when stronger evidence requires it;
 - avoid overreacting to isolated new information;
 - use intervention outcomes as evidence that can strengthen, weaken, or refine a formulation;
 - separate client agreement from evidentiary confirmation;
 - separate client disagreement from evidentiary contradiction;

correct earlier reasoning without defensiveness or hindsight rewriting.

The governing principle is:

A formulation is useful only while it remains responsive to evidence.

END OF STAGE 2 FORMULATION REVISION DRILLS