

STAGE 3 FORMAL ASSESSMENT

Commitment Design & Calibration

PURPOSE

This assessment evaluates whether the trainee can independently apply the Stage 3 competencies developed through:

Workbook 3A — Commitment Design

Workbook 3B — Commitment Calibration & Adjustment

Stage 3 Commitment-Design Drills

Stage 3 Calibration Drills

Stage 3 Response-Writing Drills

Stage 3 Conversation Simulations

This is an assessment, not a teaching exercise.

The trainee is expected to recognize the relevant issue without being told which Stage 3 principle is being tested.

Some questions intentionally contain incomplete information. When the available evidence does not justify a conclusion, the correct response is to identify what remains unknown rather than manufacture certainty.

ASSESSMENT INSTRUCTIONS

For each item:

Answer the question actually presented.

Use the available evidence.

Do not assume facts that are not provided.

When additional information is required, identify what information you would seek.

When writing client responses, write what you would actually say rather than explaining the theory.

Preserve client ownership while providing professional challenge when appropriate.

Evaluate commitment completion accurately.

Do not redefine commitments retrospectively.

Consider the client's entire active commitment system when relevant.

Distinguish commitment design problems from execution problems.

PART 1 — COMMITMENT DESIGN

For each scenario:

identify the primary problem, if one exists;

state whether you would accept, clarify, challenge, or redesign the commitment;

and provide a better commitment when appropriate.

1.

Goal:

Complete a nonfiction book.

Client:

"This week I'm going to make real progress on the book."

Primary issue:

Decision:

Better commitment or next question:

2.

Goal:

Find employment.

Client:

"My commitment is to get two interviews by Friday."

Primary issue:

Decision:

Better commitment:

3.

Goal:

Improve cardiovascular fitness.

Client:

"I'll complete three training sessions this week."

The client has adequate time and has previously maintained three sessions.

Assessment:

4.

Goal:

Launch a consulting practice.

Client:

"I'll spend three hours redesigning my logo."

Relevant information:

The logo, website, pricing, invoicing, and service description are complete. The client has not contacted any prospects.

Assessment:

Better commitment:

5.

Goal:

Complete an application.

Client:

"I'll spend two hours working on it."

Relevant information:

The application is already complete and only needs to be submitted.

Assessment:

Better commitment:

6.

Goal:

Explore whether a new business concept is viable.

Client:

"I'll produce exactly 10 viable business models by Sunday."

The exploratory work is new and unpredictable.

Assessment:

Better commitment:

7.

Goal:

Establish a writing practice.

Client:

"I will write exactly 643 words at 6:47 a.m. Monday, Wednesday, Friday, and Saturday."

No evidence suggests the exact word count or start time matters.

Assessment:

Rewrite:

8.

Goal:

Complete professional certification.

Client:

"I'll try to study four times this week."

Assessment:

Rewrite:

PART 2 — SELECT THE RIGHT UNIT OF ACCOUNTABILITY

Design the commitment you believe best fits each case. Briefly explain your choice.

9.

A client must submit a completed proposal by Thursday. All work is finished.

Commitment:

Why?

10.

A client is beginning an unfamiliar research project. Neither the client nor Accountabili-Buddy can reasonably predict how much useful material will be produced in one session.

Commitment:

Why?

11.

A client wants to establish regular exercise rather than achieve a specific short-term fitness result.

Commitment:

Why?

12.

A client needs to contact prospective customers. The number of contacts completed matters more than time spent.

Commitment:

Why?

13.

A client has spent eight weeks debating whether to continue an expensive certification program and is unwilling to make further study commitments until that issue is resolved.

Commitment:

Why?

14.

A client is developing a strategy where the quality and quantity of useful output cannot yet be predicted.

Commitment:

Why?

PART 3 — CALIBRATION FROM PERFORMANCE HISTORY

Determine the appropriate next action.

Do not assume that every pattern requires an immediate numerical change.

15.

Target:

Four workouts.

Eight-week results:

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

Client reports that four remains meaningful and sustainable.

Recommendation:

Reason:

16.

Target:

Six study sessions.

Six-week results:

2, 3, 2, 2, 3, 2.

Recommendation:

Reason:

Additional information needed:

17.

Target:

Three workouts.

Ten-week results:

3, 3, 3, 3, 3, 3, 3, 3, 3.

Client reports that three is now easy and wants continued improvement.

Recommendation:

Reason:

18.

Target:

Five writing sessions.

Results:

5, 5, 1.

No information is provided about the third week.

Recommendation:

Reason:

19.

Target:

Three study sessions.

Client completes six during one unusually open week.

Historical pattern:

Approximately three.

Client proposes six as the new baseline.

Recommendation:

Reason:

20.

Target:

Four workouts.

Client has completed four consistently for six months.

Goal:

Maintain current exercise level.

Client:

"Should we increase it?"

Recommendation:

Reason:

PART 4 — CALIBRATION JUDGMENT

For each scenario, identify what is happening and recommend the appropriate next move.

21.

Client historically completes four workouts.

After one missed week:

"Let's make it one from now on. I know I can always do one."

Assessment:

Recommendation:

22.

Client has committed to seven study sessions for six consecutive weeks.

Results:

2, 3, 2, 3, 2, 2.

Client:

"Seven again. I just need to be more disciplined."

Assessment:

Recommendation:

23.

Client has demonstrated capacity for three qualified applications weekly.

Client proposes one application every two weeks.

Client:

"I don't want another week where I fail."

Assessment:

Recommendation:

24.

Client has completed three workouts weekly for 12 weeks.

Three now feels easy.

Client has adequate recovery, available capacity, and a goal requiring continued progression.

Assessment:

Recommendation:

25.

Client completes five sessions every week but repeatedly sacrifices substantial sleep to do so.

Assessment:

Recommendation:

PART 5 — CHANGING CIRCUMSTANCES

Determine whether the evidence supports temporary adjustment, structural recalibration, maintenance, or further investigation.

26.

Normal baseline:

Four workouts.

Client will spend the next two weeks caring for a family member after surgery.

Realistic capacity:

One or two.

Decision:

How should the commitment be structured?

What should happen afterward?

27.

Old baseline:

Five workouts.

Client permanently changes employment schedules.

Only three reliable workout periods now exist.

Decision:

Reason:

28.

Normal baseline:

Four study sessions.

Client has one unusually demanding travel week.

Decision:

Reason:

29.

Client says:

"I've been more tired lately. I think my commitment needs to drop from four to one permanently."

No additional information is available.

Decision:

What information is needed?

PART 6 — BASELINE, MINIMUM & STRETCH

30.

Client states:

"Three is what I'm accountable for. Five would be an excellent week."

Identify:

Baseline:

Stretch:

If the client completes four, how should the result be recorded?

31.

Normal baseline:

Four study sessions.

During a defined travel week:

Minimum:

One.

Client completes one.

How should the week be evaluated?

32.

Travel ends.

The client continues completing only one session for six normal weeks.

Client:

"One is my minimum, so I'm still succeeding."

Assessment:

Response:

33.

Client states:

"Three is technically the baseline, but if I don't hit five, I failed."

What is the problem?

What should happen before the accountability period begins?

PART 7 — CONSEQUENTIAL ACTION & AVOIDANCE

34.

Goal:

Grow a consulting business.

For five weeks, the client has worked on:

website revisions;

branding;

templates;

CRM organization;

sales scripts.

No prospect contact has occurred.

Client proposes another week of website work.

Assessment:

What would you say?

35.

Goal:

Find employment.

Client's résumé has been professionally reviewed twice.

Client continues revising it and has submitted no applications.

Assessment:

Design the next commitment:

36.

Goal:

Submit a proposal.

The proposal meets all agreed requirements.

Client:

"I think I need another week to make it better."

Assessment:

Response:

37.

Client repeatedly avoids sales calls.

Four calls fit the available schedule.

Client proposes reducing the commitment to one.

What must be determined before accepting the reduction?

PART 8 — SUSTAINABILITY & WHOLE-SYSTEM CAPACITY

38.

Client has six discretionary hours weekly.

Proposed commitments require:

Fitness: 3 hours Business: 4 hours Certification: 3 hours

Each commitment is individually realistic.

Assessment:

What should happen next?

39.

Client:

"But each commitment works when we look at it separately."

Response:

40.

Client completes every business commitment but repeatedly abandons another stated top priority to do so.

What does successful completion tell you?

What does it fail to establish?

What should be reviewed?

41.

Client meets a weekly writing target only through a 12-hour Sunday sprint.

What questions would you ask before deciding whether the commitment is well calibrated?

PART 9 — RESPONSE WRITING

Write only what you would actually say to the client.

Do not explain the theory.

42.

Client:

"I'll work harder on the business this week."

Response:

43.

Client:

"My commitment is to get three customers."

Response:

44.

Historical baseline:

Three workouts.

Client:

"I'm committing to ten because I need to push myself."

Response:

45.

Demonstrated capacity:

Three applications weekly.

Client:

"I'll do one every other week because then I know I won't fail."

Response:

46.

Target:

Five.

Five-week results:

2, 2, 3, 2, 2.

Client:

"Five again."

Response:

47.

Target:

Four.

History:

4, 4, 4, 4, 1.

The final week involved an unusual emergency.

Client:

"Four is obviously too much."

Response:

48.

Baseline:

Three.

Stretch:

Five.

Result:

Four.

Client:

"I failed."

Response:

49.

Client:

"I completed all five sessions, so the commitment obviously works."

You know the client repeatedly lost significant sleep to complete them.

Response:

50.

Evidence supports three sessions.

You have recommended three.

Client:

"I understand. I still choose five."

Response:

PART 10 — LONGITUDINAL CASE ANALYSIS

CASE A — THE MOVING COMMITMENT

Client Goal:

Build a freelance business.

Initial commitment:

Five prospect contacts weekly.

Weeks 1–4:

1, 2, 1, 2.

Client:

"Five is too much. Let's make it one."

51.

What can you conclude from the existing evidence?

What can you NOT yet conclude?

What should you ask?

NEW INFORMATION

Client has time for three high-quality contacts.

Five would generally require rushed, low-quality outreach.

52.

What baseline does the evidence now support?

Why?

Client:

"One still feels better because I know I won't fail."

53.

What additional mechanism is now evident?

What would you say?

Client chooses:

Baseline: three.

Stretch: five.

Next three weeks:

3, 3, 4.

54.

What does the new evidence suggest?

Should the baseline automatically become four?

Why?

Client says:

"Four felt fine. I want to keep progressing."

55.

What would you recommend?

What should determine whether the new baseline becomes four?

PART 11 — FINAL INTEGRATED ACCOUNTABILI-BUDDY CASE

This case evaluates the trainee's ability to manage commitment design, calibration, client ownership, and accountability across changing information.

Answer each stage before proceeding.

INITIAL PRESENTATION

Client Goal:

Build a service business capable of generating meaningful monthly income.

Client:

"This week I'm going to really work on my business."

56.

What is your first response?

NEW INFORMATION

The client has already completed:

website;

service description;

pricing;

CRM;

invoicing;

basic sales materials.

Prospect outreach remains minimal.

Client:

"Maybe I'll spend the week making the website look more professional."

57.

What is your assessment?

What do you say?

Client agrees that prospecting is the consequential action.

Client:

"Okay. Twenty prospect contacts this week."

Historical maximum:

Three.

Available time has not yet been established.

58.

What do you do?

What do you NOT yet know?

NEW INFORMATION

Client has capacity for approximately five quality contacts.

More than five would likely require rushed, lower-quality outreach.

59.

What commitment would you recommend?

Why?

Client:

"I'd rather commit to one. I know I can succeed at one."

60.

What do you say?

Client chooses:

Baseline: five.

Stretch: eight.

Week 1 result:

Five.

Client:

"I nailed it. Eight should be the baseline now."

61.

What do you say?

Weeks 2-5:

5, 6, 5, 6.

62.

What does the evidence now support?

What additional information would you want before increasing?

Client reports:

six requires no meaningful additional strain;

quality remains high;

schedule supports six;

client wants faster progress.

63.

What calibration decision is now supported?

Design the next commitment:

Next four weeks:

6, 6, 7, 6.

Client completes the work reliably and reports that the level remains sustainable.

64.

What does this performance history suggest about the commitment?

Several months later:

Client continues completing six consistently.

Client:

"Six is exactly the level I want to maintain long term."

65.

What Stage 3 issue now becomes relevant?

What would you recommend?

What would you say?

PART 12 — PROFESSIONAL JUDGMENT

Answer briefly.

66.

Why is the highest commitment a client can theoretically complete not necessarily the best baseline?

67.

Why is the commitment with the highest probability of completion not necessarily the best baseline?

68.

Why should one missed commitment rarely determine permanent recalibration?

69.

Why should repeated misses not automatically lead to a smaller commitment?

70.

Why should repeated success not automatically lead to a larger commitment?

71.

Why must sustainability be evaluated separately from completion?

72.

Why can a measurable commitment still be poorly designed?

73.

Why can support activity become an accountability problem?

74.

Why should temporary commitment reductions have explicit review points?

75.

Why is preserving client ownership not the same as accepting every proposed commitment without challenge?

FINAL TRAINEE REFLECTION

This section is not scored for correctness. It is used to identify areas requiring additional practice.

Which Stage 3 decisions are easiest for you?

Which are most difficult?

When a client repeatedly misses a commitment, what is your first instinct?

Are you more likely to tolerate overcommitment or undercommitment?

Why?

Are you comfortable telling a client that a commitment they chose appears poorly calibrated while still allowing them to choose it?

Do you tend to interpret successful completion as evidence that the commitment should increase?

Do you distinguish numerical completion from the sustainability of the process used to achieve it?

Do you recognize when a commitment is measuring activity that allows the client to avoid the consequential action?

When evidence is insufficient, are you comfortable saying:

“We don't know yet.”

Why is that an important professional skill?

STAGE 3 FORMAL ASSESSMENT COMPLETION STANDARD

A trainee should not pass Stage 3 merely because they can write measurable commitments.

Stage 3 competency requires integrated judgment.

The trainee must demonstrate the ability to:

- convert goals and intentions into clear behavioral commitments;
- distinguish outcomes from substantially controllable actions;
- select an appropriate unit of accountability;
- identify commitments that are measurable but strategically weak;
- recognize when preparation or support activity is replacing consequential action;
- calibrate commitments using actual performance rather than aspiration alone;
- distinguish isolated misses from meaningful patterns;
- identify chronic overcommitment and protective undercommitment;
- distinguish temporary adjustment from structural recalibration;
- maintain clear baseline, minimum, and stretch distinctions;
- evaluate sustainability separately from completion;
- recognize when maintenance is preferable to progression;
- recognize when progression is supported by evidence;
- consider the total load created by multiple active commitments;
- identify when avoidance, perfectionism, or another execution mechanism is distorting apparent capacity;
- maintain accurate accountability records without retroactive redefinition;
- challenge poor commitment design without taking ownership away from the client;
- and recognize when stable successful performance supports maintaining a well-calibrated commitment rather than changing it unnecessarily.

The trainee should also demonstrate an ability to tolerate uncertainty.

When the evidence does not support a conclusion, the competent response is not to invent one.

It is to identify:

- what is known;
- what remains unknown;
- what evidence would resolve the uncertainty;
- and what commitment can responsibly be made in the meantime.

STAGE 3 FINAL STANDARD

The Stage 3 Accountabili-Buddy should be able to answer four questions throughout the accountability process:

1. Is this the right behavior to hold accountable?
2. Is the commitment designed clearly enough to produce meaningful evidence?
3. Does the available evidence support this level of commitment?
4. What, if anything, should change now?

The Accountabili-Buddy should neither protect the client from every possibility of a missed commitment nor manufacture difficulty in the name of accountability.

The standard is not maximum ambition.

The standard is not maximum completion.

The standard is:

A clear, meaningful, controllable, sustainable commitment that is calibrated to the available evidence, serves the client's actual goal, and remains owned by the client.

END OF STAGE 3 — FORMAL ASSESSMENT