Characteristics of Stage: Formal

Stage description:
Someone at the Formal stage works with one causal or predictive variable at a time. If given a list of factors, they can reason out what the single logical causal factor is at work. In a work environment, this translates to carrying out a single objective that is part of a greater whole. When justifying their reasoning, they present supporting evidence that is empirical or logical in nature.

Optimal management:
Employees at the Formal stage should be given tasks that require a certain amount of logical deduction or experimentation, but that do not require working with more than one causal variable at a time. These employees may provide a certain level of feedback regarding their role, so they require regular communication. They will feel frustrated and lost if they do not see the importance of their role.

Ideal tasks:
Handling deals requiring understanding of logic; calculating interest rates and rate of returns on investments; collecting marketing data; working to solve simple one-dimensional problems; running standard statistical analyses; writing simple reports that follow a format.

Strengths:
Using logic and empirical evidence to reach conclusions; understanding when regulations are being followed; very good at solving simple problems when there is a single cause for the problem.

Weaknesses:
May only consider one causal variable at a time when problem solving; does not deal well with competing priorities so is unable to create a budget or strategic plan; unable to settle conflicts between people; does not understand systems yet; and is more likely to place blame rather than resolve conflict.

As a supervisor (when applicable):
Formal-stage performing supervisors should be utilised as low-level supervisors. They delegate tasks and give instructions to employees and may be held responsible for the work of other employees. They may work within a budget, but should not be in charge of making a budget. They should only act as supervisors for employees that perform at the Abstract, Concrete or Primary stages.

Transition stage:
The score 10.2 places the candidate at the Low–Middle sublevel of the stage. They are not likely to transition into the next stage for a couple of years. This transition period can be greatly decreased by instituting a support program in the form of instruction and modelling. This training can have near immediate results for specific tasks, but it will still be a fair amount of time until a higher level of reasoning can be applied in a broad way consistently. Someone who performs two stages higher should assist with the training program.