

Self-Assessment Writing Kit

For business analysts, BAT analysts and QA testers | TechFitFlow.com | October 2026

Use this kit with the article **Performance Review Self-Assessment Examples for Business Analysts and QA Testers**. All examples are fictional. Replace bracketed values with your own numbers.

1. Evidence checklist

- ☐ Stories written or refined (Jira)
- ☐ Releases or sprints supported
- ☐ Defects logged, grouped by severity
- ☐ Critical defects caught before production
- ☐ Test cases executed; cycles finished on schedule
- ☐ BAT/UAT sign-offs completed
- ☐ Number of Scrum teams or projects supported
- ☐ Thank-you emails or sprint review mentions
- ☐ Required trainings completed (dates)
- ☐ New tools or skills learned

JQL to pull your work (Jira):

```
assignee = currentUser() AND resolved >= startOfYear() ORDER BY resolved DESC
```

```
reporter = currentUser() AND issuetype = Bug AND created >= startOfYear() ORDER BY priority DESC
```

If the second query returns nothing, your project may use a different issue type name, such as Defect.

2. STAR worksheet (one per goal)

Step	Your notes
Goal (as written on the form)	
S: Situation - project and pressure	
T: Task - your specific responsibility	
A: Action - what you did (active verbs)	
R: Result - number, date or business effect	
Final comment (2-4 sentences)	

3. Rating-to-wording guide (example 5-point scale)

Rating	Evidence it needs	Wording that fits
5 Significantly exceeded	Results beyond the goal, extra scope, or impact outside your team	went above, ahead of schedule, also took on, plus numbers
4 Exceeded	Goal met plus one clear extra contribution	met and improved, added, reduced
3 Met	Goal delivered as defined, on time	completed, delivered, on time
2 Partially met	Progress plus a named blocker and a recovery plan	completed X of Y, next step is

Scales and labels vary by employer. Always use your company's own rating definitions.

4. Core values formula

Behavior + specific example + effect on others

Value	Example (fictional)
Commitment	I keep my deadlines, even when requirements change late. When scope grew mid-sprint on [project], I re-planned my test cases and still finished on time.
Focus	I supported several Scrum teams at once and blocked time for each team so no testing cycle slipped.
Openness	I report problems as soon as I find them. On [project], I flagged a data issue before launch.
Respect	When there is a disagreement, I walk through the issue together with the team so we all understand the problem, then solve it.
Courage	I held a release when acceptance tests failed and explained the risk with test evidence.

Values shown are the five Scrum values from the 2020 Scrum Guide. Replace them with your company's value names.

5. Areas for improvement phrase bank

- I'd like to keep learning new tools and skills, such as [SQL / test automation].
- I'm working on balancing thoroughness with speed when deadlines are tight.
- I'd like to take on more ownership of larger projects.
- I want to share my ideas earlier in refinement sessions.
- I'd like to learn more about other areas of the business to see the bigger picture.
- I'd like to build more confidence when speaking up in larger meetings.
- I'm working on [one area], and I'd welcome feedback on other ways to grow.

Avoid: "none," overly personal details, or wording that asks your manager to fix something for you.

6. Plain-language checklist

- [] One idea per sentence
- [] Start with a verb you did: wrote, tested, found, led
- [] Replace slashes (projects/testing) with "and"
- [] Put "and" before the last item in a list
- [] Cut filler such as "I would like to mention that"
- [] Check: "piece of work" (not peace); you "make" mistakes
- [] Search for "[" so no placeholders remain
- [] Read it aloud before you submit

7. Accomplishment log (start now for next year)

Month	What I did	Result / number	Proof (link, email, ticket)
Jan			
Feb			
Mar			
Apr			
May			
Jun			
Jul			
Aug			
Sep			
Oct			
Nov			
Dec			

Do not record patient, member or customer data in this log. Use ticket IDs and summaries only.