When Should Plans Be Updated?

Idea In Short

Update an acquisition plan whenever new information could change the need, the chosen approach, affordability, timing, risk, or expected result. Set review points before major commitments, then monitor explicit triggers such as a changed requirement, a supplier market shift, a budget revision, or a failed technical test. Assign owners to assumptions so the team knows who must report new evidence. A planned review cadence helps, but calendar reviews alone are not enough. The objective is to keep decisions valid while avoiding unnecessary rework. Preserve earlier versions and record why the strategy changed, so approvers and delivery teams can understand the path from initial assumptions to current choices.

An acquisition plan is built on evidence and assumptions that can change. User needs evolve, budgets shift, suppliers enter or leave markets, technology matures, and delivery risks become clearer. A plan that is not reviewed can remain formally approved yet become practically obsolete. Updating it does not require rewriting every section whenever a fact changes. It requires identifying whether new information affects a decision, then revising the affected analysis and approvals in a traceable way.

Establish review points early

Set review points when the plan is approved. Common checkpoints include completion of needs analysis, approval of the sourcing strategy, release of a solicitation, evaluation, award, transition, and major implementation milestones. The team can use these gates to confirm that the underlying assumptions still hold before making a commitment that is difficult to reverse.

Review cadence should reflect the pace of change. A stable purchase with familiar suppliers may need only a few checkpoints. A technology or service market changing quickly may require more frequent review. The plan should identify what evidence will be checked at

each point and who owns the review. The Sourcing Playbook describes delivery model assessments as iterative and emphasizes early planning for market, cost, risk, and implementation conditions.1

Define triggers for event-based review

Calendar checkpoints cannot catch every material change. Set event-based triggers such as a significant scope change, an unexpected cost estimate, loss of a key supplier, a new dependency, a failed pilot, a changed regulation, a serious incident, or a delay in a critical approval. A trigger does not automatically mean the strategy must change. It means the team should assess whether the event affects the original decision.

Make triggers observable. “Review if the market worsens” is too vague. “Reassess if fewer than three suppliers can meet the minimum service window” gives the team a condition it can test. Triggers should be proportionate to consequence. A minor variance may be handled by a project lead, while a material change to outcome, affordability, or risk should return to a senior approver.

The European Commission's guidance on evaluating laws and policies explains how evaluation evidence can inform decisions about revision. The same logic applies to acquisition plans: gather evidence on performance and changed conditions before deciding whether the current approach remains fit for purpose.2

Track assumptions and market conditions

Assumptions often become stale before teams notice. Record each material assumption with an owner, source, confidence level, and date for validation. Examples include estimated demand, integration effort, supplier capacity, user adoption, budget availability, and expected operating cost. When evidence confirms an assumption, update the record. When evidence contradicts it, evaluate the decision that depended on it.

Market research should be refreshed when a market is volatile or the time between planning and solicitation is long. Check supplier availability, substitute solutions, price drivers, supply chain constraints, and the level of interest in the opportunity. The World Bank's PPSD guidance notes that planning analysis may be revisited as additional information emerges, and that the level of analysis should fit context, value, and risk.3

Update only what the change affects

When a trigger occurs, map its effect. A budget reduction may change scope, contract duration, or phasing. A new data requirement may alter technical specifications, evaluation, security review, and contract terms. A delayed approval may affect the timetable but not the need or market strategy. Revising only the affected decisions keeps the plan responsive without forcing teams to repeat valid analysis.

However, linked decisions must be revisited together. If requirements change materially, evaluation criteria and cost estimates may no longer be valid. If supplier capacity changes, packaging and competition plans may need adjustment. The team should identify dependencies and use a change impact review rather than editing the paragraph where the change first appeared.

Preserve decision history and approval

Record what changed, the evidence behind it, which earlier assumptions were invalidated, and the effect on cost, schedule, risk, and outcomes. Include the person who recommended the change and the authority that approved it. Preserve previous versions so that reviewers can understand the decision path. A concise decision log may be enough for small changes; major changes should be reflected in the formal strategy and supporting analysis.

The OECD's Recommendation on Public Procurement connects accountability, evaluation, and risk management across the procurement cycle. Maintaining a change record supports those practices by making it possible to explain how new evidence influenced the approach.4

Coordinate updates with delivery teams

Plan updates should reach people who rely on them. Procurement, technical staff, finance, operations, risk owners, and intended contract managers need timely notice of material changes. If a solicitation has already been released, assess fairness and communication implications before changing requirements. If a contract is in place, distinguish plan updates from contract amendments and follow the appropriate authority.

The United Nations Commission on International Trade Law's Model Law on Public

Procurement is designed around transparent and fair procurement procedures. Though organizations operate under different frameworks, the underlying lesson is useful: changes affecting suppliers or decision outcomes should be handled openly and consistently.5

Learn from the review process

Review whether the triggers worked. Did the team detect market movement early enough? Were assumptions owned and validated? Did approval gates occur before commitment? Did a plan change arrive too late to protect value? Use these lessons to improve future planning and governance. Do not reward teams for keeping a plan unchanged; reward them for detecting relevant change and responding with a clear rationale.

Plans should evolve when evidence changes, but every revision should serve a decision. Scheduled checkpoints establish discipline, event triggers catch unexpected developments, and change records preserve accountability. Together, these practices keep the strategy aligned with current conditions while retaining a usable history of how the organization reached its choices.

- 1The Sourcing Playbook
- 2Evaluating Laws and Policies
- 3Project Procurement Strategy for Development Guidance
- 4OECD Recommendation on Public Procurement
- 5UNCITRAL Model Law on Public Procurement

Summary

Plans stay useful when their owners know what could make them stale. Build reviews around milestones and triggers, update only the analysis affected by new facts, and record consequential changes with the right approvals. Keep a history of decisions so the team can distinguish changed circumstances from changed judgment. This discipline helps organizations adapt without losing accountability or restarting analysis that remains sound.