PLANNING CHECKLIST:
Five Key Steps for 2D to 3D Transition Planning

KETIV

About this checklist:

Transitioning from 2D to 3D design requires thorough preparation and a structured process. This categorized checklist outlines essential tasks and considerations to ensure a smooth transition, with definitions of how each supports the planning phase and long-term success.

Contact KETIV if you have questions or need guidance on your 2D to 3D design transition.

1. Program Management and Leadership Alignment

- [ ] **Assign a Program Manager**
  A dedicated manager will oversee timelines, resources, and stakeholder alignment.
- [ ] **Identify Champions & Power Users**
  Appoint experienced users to lead adoption efforts and mentor others.
- [ ] **Set Training Goals**
  Define the training strategy to ensure all team members will be able to gain proficiency with the new tools.
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2. Industry Research and Goal Setting

- [ ] **Research Industry Trends**
  Study how similar companies are leveraging 3D workflows to determine best-practices.
- [ ] **Focus on Proven Methodologies**
  Adopt practices validated in similar industries to avoid common pitfalls.
- [ ] **Identify Milestones**
  Set clear objectives to track the progress of your 3D adoption (e.g., first automated BOM release, first full 3D assembly).
- [ ] **Measure Success**
  Define metrics for success, such as time savings, error reduction, or improved collaboration between teams.

3. Workflow Assessment and Cross-Functional Collaboration

- [ ] **Assess Existing Workflows and Dependencies**
  Map current workflows across departments to identify manual steps or inefficiencies that can be automated.
- [ ] **Engage Cross-Functional Teams**
  Ensure all relevant departments—engineering, operations, manufacturing, and sales—are involved in designing new processes.
  (Example: Align with sales on how BOMs will integrate into their order management systems.)
- [ ] **Capture Design Standards and Templates**
  Document current design conventions, part naming schemes, and templates to maintain consistency across new 3D workflows.

4. Licensing, Documentation, and Reference Building

- [ ] **Anticipate Licensing Needs and Budget**
  Evaluate Autodesk tool licenses (e.g., Inventor, Vault, Plant 3D) and budget for future scaling.
- [ ] **Maintain Good Documentation**
  Develop comprehensive documentation for new workflows, licensing processes, and troubleshooting guides.
- [ ] **Build a Database of Reference Materials**
  Create a library of whitepapers, tutorials, and internal videos to support ongoing learning.
  (Example: Use Autodesk KVA recordings and unlisted YouTube tutorials to build this knowledge base.)

5. Long-Term Adoption and Change Management

- [ ] **Identify Impacts to Product Development and Customer Lifecycle**
  Evaluate how the transition will affect delivery timelines, customer expectations, and post-sale service processes.
  (Example: If manufacturing relies on 2D PDFs, ensure the new 3D process provides automated PDF exports through Vault.)
- [ ] **Anticipate Team Size and Structure Needs**
  Set clear objectives to track the progress of your 3D adoption (e.g., first automated BOM release, first full 3D assembly).
- [ ] **Plan for Recurring Engagement**
  Schedule monthly check-ins or team meetings to monitor the transition and identify areas for improvement.