ASSEMBLY REVIEW CHECKLIST

Plan a useful evaluation.

Start with one assembly and a decision that matters. Use this checklist to align the engineering team and the budget owner on what an earlier tolerance answer needs to prove.

For the engineering lead

- [ ] 01 **Define the fit question**

  Choose a decision the team needs to make: clearance, interference, gap or alignment at a critical interface. Record the acceptable limits, the design revision and the date the answer is needed.

- [ ] 02 **Choose a representative assembly**

  Prepare a STEP assembly and the relevant drawings. Choose a familiar fit problem or an upcoming design decision, with enough context to compare the analysis against the current engineering approach.

- [ ] 03 **Make the assumptions explicit**

  List the tolerances, locating surfaces, mating conditions and assembly sequence that matter. Note relevant GD&T, rotation or non-rigid effects. We will confirm the supported scope together before an evaluation starts.

For the decision team

- [ ] 04 **Record the current baseline**

  Document the tools, setup hours, analysis hours, specialist input and handoffs needed today. Distinguish hands-on engineering time from elapsed time waiting for an answer. Use the same fit question for comparison.

- [ ] 05 **Agree what success looks like**

  Set targets for time to a reviewable answer, scenarios explored and the evidence needed to support a design decision. Name an engineering reviewer, a budget owner and a date to review the outcome.

- [ ] 06 **Build the business case**

  Use measured engineering time and the expected number of studies per year to estimate annual value. Separate measured savings from estimated avoided rework. Include license, onboarding and internal review effort in the decision.

PUT IT TO WORK

Bring the question. We will plan the evaluation.

Start with a demo to discuss fit and scope. A hands-on evaluation tests StackUp 3D on a real assembly against agreed criteria. The next step is an annual enterprise license for the engineering team.

Book a demo: metafold3d.com/#evaluation