# The Definitive Guide to Planning a 3D Project

Everything retailers need to know about getting started with 3D

Managing a 3D project is exciting but can be tricky. We've been through it dozens of times, and this 3D ebook includes all of our learnings from the past decade.

If your company is considering a new 3D strategy, use these tips to build a successful 3D project from start to finish.

**3D Cloud**™
MARXENT

# Step 1
# Establish a 3D content pipeline
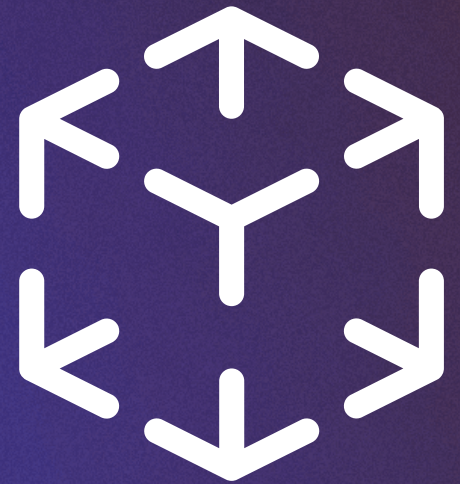
**Step 1:** Establish a 3D content pipeline

A 3D content pipeline is a workflow system that aligns people, hardware and software to work in a specific sequence. It is a must-have for retailers and manufacturers who need to order and manage accurate, configurable 3D content at scale. Here's why:

1. **3D content at scale requires a process.** It keeps 3D initiatives on track.

2. **3D content is still expensive.** Reduce costs through reusability and efficiency.

3. **Speed to market.** Align 3D content delivery to merchandising priorities.

4. **Quality control.** Ensure that the delivered content meets your quality standard.

5. **Maximum consistency and reusability.** Reuse 3D assets across experiences.

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**Decimation vs. Multiple LODs**

Two common approaches to designing a 3D content pipeline are:

- **Decimation.** Create 3D models at high LODs (levels of detail), and enable reuse by "decimating" or scaling down high LOD models.

- **Multiple LODs.** Create 3D models at high, moderate and low levels of detail upfront to maximize reuse and portability.

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**TIP** 💡

Think beyond a single use case. Focusing too narrowly could limit reuse of assets in future 3D experiences.

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3D Content Pipeline Checklist

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Getting Started with 3D: How to Build a 3D Content Pipeline
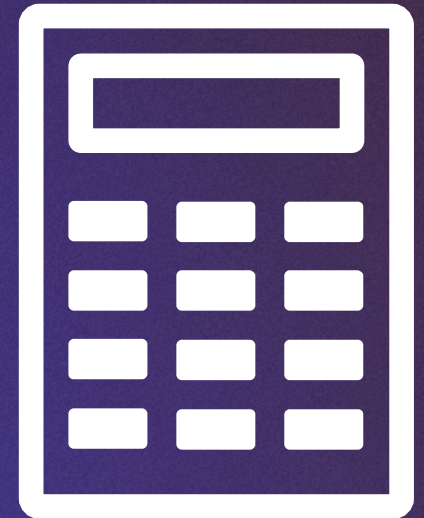
## AI and the future of 3D content generation

In the coming years, AI will significantly lower the cost of 3D content creation. It will generate photorealistic 3D visualizations of products from 360° videos and create intricate 3D geometries and textured meshes from simple line drawings. The ultimate goal is to automatically generate high-quality 3D models from just a few photos or text inputs, which is rapidly becoming a reality.

# Step 2
## Build a 3D project business case

A compelling business case is the key to securing funding for a new 3D initiative. A solid 3D project business case is a structured story of value and opportunity of a proposed 3D project.

**5 elements of a 3D project business case**

1. **Executive summary.** Give an overview of the problem and proposed solution.

2. **Problem and solution.** Identify key challenges and propose a solution with supporting data.

3. **Market analysis.** Analyze current and emerging customer trends and competitors.

4. **Project plan.** Create a realistic plan that outlines the path to the proposed solution.

5. **Financial plan.** Demonstrate how the project will deliver ROI.

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**Problems to solve**

Use these questions to dig deeper into the problems at play and how 3D technology can support a positive outcome.

- What challenge is the business facing that 3D can help solve?

- What are the consequences of not changing?

- What cultural, economic, and behavioral factors necessitate investment?

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**TIP**

To identify a 3D project that will resonate with your executive team, use the 3D business case process to view the project through the lens of core business priorities.

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3D Business Case Template

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How to Build a 3D Project Business Case

# Step 3
Decide to build in-house
or use a vendor

# Will you use existing talent, hire new talent, or outsource the project to a third-party vendor? Ask yourself these questions to find clarity.

### 1. Is this a one-time campaign?

Outsource a one-time campaign to an agency. Use a SaaS white label if it requires future-proofing. In-house needs a big team and a long runway.

### 2. How many 3D products do you need?

Scale requires a 3D content pipeline, centralized content management, analytics, and automation for growth beyond a single application or small product catalog.

### 3. Do you have the right team in place?

You'll need general tech roles (e.g., product/project managers), retail roles (e.g., merchandisers), and specialized 3D roles (e.g., artists, developers, QA).

### 4. What's your need for speed?

Work with a vendor for faster speed to market. An established vendor will be able to support long-term initiatives and ensure a return on investment.

> **It's essential to balance two key factors: speed to market and efficiency.**

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**TIP**

A third-party vendor can reduce or eliminate the need to create an entire business unit dedicated to your 3D initiative. It's faster to work with a 3D vendor.

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Build vs. Buy Framework

**READ THE FULL ARTICLE**

Build vs. Buy: A Framework for Strategic 3D Initiatives

# Step 4
Research vendors

Find 3D vendors with industry-specific experience. It's critical for project success. For instance, for lipstick, look for cosmetics experience. For home improvement/ furniture, find a home goods expert.

## 4 ways to assess industry experience

1. **Industry-specific rules.** Does the vendor have recent successful experience developing products with industry-specific rules?

2. **Industry-specific best practices.** Can the vendor demonstrate knowledge of industry-specific best practices?

3. **Customer journey knowledge.** Can the vendor provide a customer journey map reflecting industry experience?

4. **3D content and materials experience.** Request specific 3D content samples reflecting what you'll order.

**5 reasons to select a 3D partner with industry-specific expertise**

- They exist
- Understanding of business rules
- Speed to market
- Knowledge of materials
- Customer journey awareness

**TIP** 💡

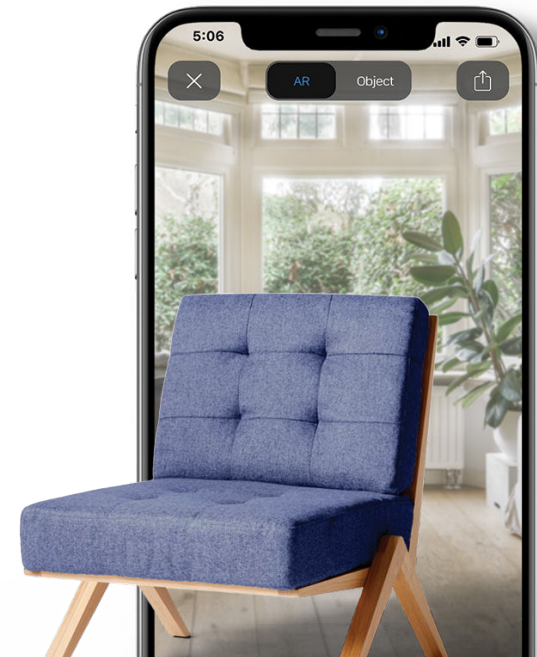You'll benefit from a partner with multiple successful deployments within your industry.

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**3D Partner Evaluation Checklist template**

**READ THE FULL ARTICLE**

**3D Vendor Selection: Why Industry Expertise Matters**

# Step 5
Create a project charter

A solid 3D project charter is the best way to kick off a 3D initiative and provide a clear roadmap to measurable outcomes and organizational buy-in. It spells out the project's essential components.

## 7 essential elements of a strong project charter

1. **Goals and objectives.** Define what you want to accomplish and align with business objectives.

2. **KPIs and success metrics.** Determine the metrics for success.

3. **Project scope.** Define parameters, decide on initial and later project components.

4. **Roles and responsibilities.** Define team and vendor responsibilities.

5. **Milestones and deliverables.** Specify completion points and deliverables.

6. **Project risks.** Outline dependencies and risks.

7. **Post-launch support.** Detail support requirements for immediate and long-term support.

**Project scope can include:**

- Distribution channels
- Key audiences
- Content required
- Target launch date
- Freeze periods

**TIP**

Reference the project charter throughout the project to keep everyone focused and on track.
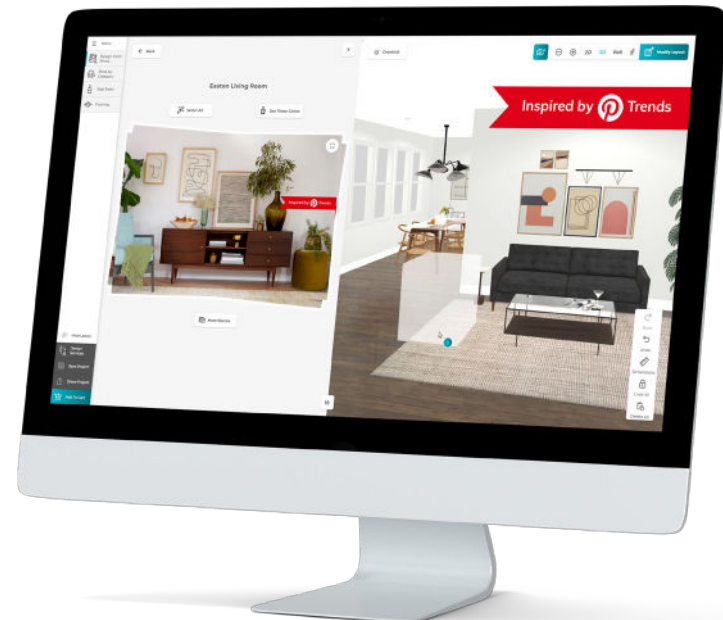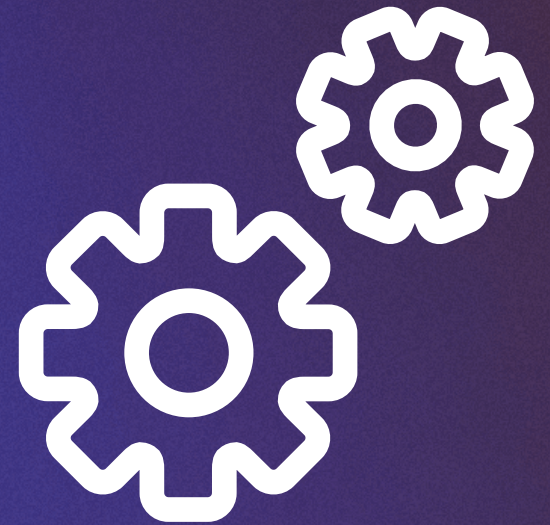
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**3D Project Charter template**

**READ THE FULL ARTICLE**

3D Project Charter Template

# Step 6
## Run a 3D-centered RFP process

An RFP can simplify vendor evaluation for complex 3D projects. It collects information from multiple vendors and helps you choose the best fit quickly.

## 6 essential elements of a 3D RFP

1. **3D content creation, management, and distribution.** Can the vendor create 3D models in-house? Will you own the content? How will you access those assets?

2. **Functional requirements for 3D experiences.**
   Does the vendor's experience align with your priorities?

3. **Implementation, rollout, and project management.** How does the vendor balance product quality and speed to market?

4. **Reporting and analytics.** How does the vendor report results? What data access will you have?

5. **Value-added services.** Does the vendor offer training or merchandising support?

6. **Commercial terms and pricing.** What is their pricing model? What's included in their fees?

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**Typical sections in a 3D RFP**

- Company Overview
- Project Goals and Business Objectives
- Project Scope
- Budget

- Submission Requirements
- Evaluation Criteria
- Key Contacts

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**TIP** 💡

Reduce vendor confusion and ensure high-quality responses by taking the time to write crisp functional requirements.

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[Sample RFP Table of Contents for 3D Projects](#)

**READ THE FULL ARTICLE**

[RFP Table of Contents for 3D Projects](#)

# Step 7
## Evaluate 3D capabilities of vendors

# Use your project charter and RFP to create a prioritized scorecard of project requirements for a fair vendor assessment.

## 5 essential questions to ask vendors and your team

1. **Scalability.** Can the vendor handle multiple 3D applications? Will the platform scale with new 3D content use cases and content libraries?

2. **Case studies and references.** Can the vendor provide examples of their work and customer reviews?

3. **Roles and responsibilities.** Can the vendor assist with project management? What roles will they fulfill versus your team?

4. **Value creation.** Does the vendor offer analytics and best practices for measuring ROI? Do they have a roadmap for innovation?

5. **Partnership.** Will the vendor work with you to resolve issues and ensure the best outcome for your organization?

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**Examples of functional and non-functional requirements**

Functional requirements describe required features, capabilities, and integrations. Examples are:

- Manage 500+ product SKUs
- Display on popular web browsers on desktop and mobile

Non-functional requirements describe other qualities or attributes that should inherently exist in a given platform or application. Examples are:

- Availability (e.g., 99.99% uptime)
- Speed and performance

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**TIP** 💡

Different vendors may suggest different approaches to deliver on a given requirement. Focus on the outcomes while remaining adaptable and flexible to a range of approaches.

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**3D Vendor Evaluation Scorecard**

**READ THE FULL ARTICLE**

**How to Evaluate 3D Vendor Capabilities**

# Step 8
## Align internal resources

You've built the case for investment in 3D, made a build or buy decision, and are ready to secure the internal resources. Use these questions to kick off your resourcing plan.

## 4 essential resourcing questions

1. Do you have the right mix of skills and experience, or might you need to train, hire, or outsource certain pieces?

2. Does the designated talent have the skills to deliver?

3. What is your communication plan, and will it keep relevant stakeholders in the know?

4. Which collaboration tools will you use?

**TIP**

Communication and alignment are everything. Take the time to educate key stakeholders on your 3D project. Alignment makes it much easier to get the resources you need to be successful.

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**3D Project Resource Plan template**

**READ THE FULL ARTICLE**

**Aligning Resources for 3D Projects**

Next …
## Negotiating for resources

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# Negotiating for resources

Once you've answered the essential resourcing questions, you're ready to negotiate respectfully with cross-functional stakeholders. That's right — you might have to negotiate to get the internal resources you need and want. These tips might increase your chance of success.
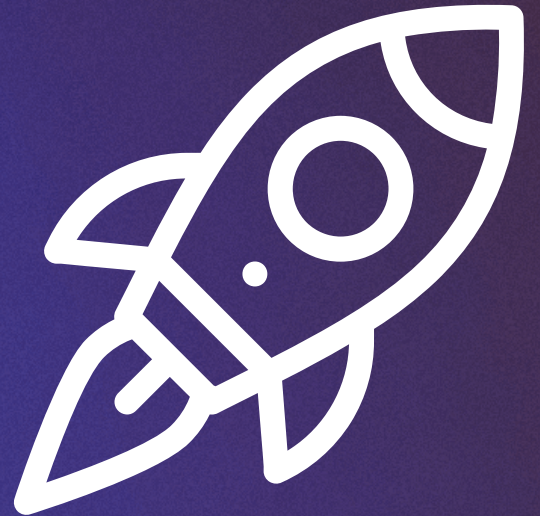
- **Know your audience.** Identify the decision-makers who have the power to provide the help you need. Understand their priorities, concerns, and constraints.

- **Be flexible.** Be open to compromise and pursue creative solutions. Be prepared to suggest alternatives if your initial request is not feasible.

- **Use data and evidence.** Show that the project will generate revenue or reduce costs. Focus on how the project aligns with the company's strategic goals.

- **Follow up.** Ensure that the resources you were promised are actually allocated to your project. Keep stakeholders apprised of the project's progress and impact.

> **Whether or not your resource negotiation succeeds, a respectful approach can build your credibility in the organization and increase your project's visibility.**
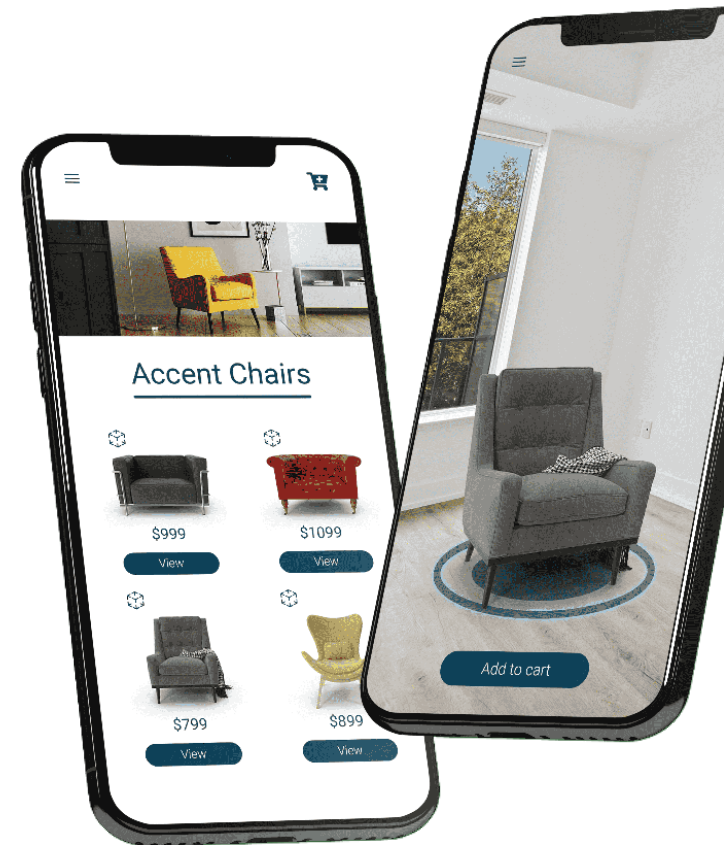
# Step 9
## Kick off your 3D project

It's time to turn vision into action and mobilize the team. A successful 3D project starts with a well-planned kickoff meeting. An effective 3D project kickoff meeting aligns senior leadership, project team members, and external partners on project details and objectives.

## 4 essential elements of a successful 3D project kickoff meeting

1. **Set a clear purpose.** A 3D project kickoff meeting aims to generate excitement and ensure team alignment.

2. **Encourage excitement.** 3D projects are a great opportunity for employees to make their mark.

3. **Share detailed information.** Explain the WHY behind the project, what it entails, how the roles will work, and what's expected of each team member.

4. **Provide a kickoff agenda.** A crisp agenda will focus the meeting.

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### Sample 3D kickoff project agenda

- Team intros – 5 mins
- Project background – 10 mins
- Project details – 15 mins
- Ways of working – 5 mins
- Next steps – 5 mins
- Q&A – 5 mins

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**TIP** 💡

Find a partner that is willing to schedule and structure the kickoff meeting, as well as commit to regular check ins and quarterly business reviews.

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3D Project Kickoff Meeting template

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3D Project Kickoff Best Practices

# Conclusion

We hope this ebook serves as a useful guide to launching a 3D project. Don't hesitate to contact **3D Cloud™ by Marxent** with any questions. We are here to help.

Good luck with your project!

**For more information, visit our 3D Project Planning Resource Center**

**3D Project Planning Templates**

Step 1:   3D Content Pipeline
Step 2:   3D Business Case Template
Step 3:   3D Business Case Build vs. Buy Framework
Step 4:   3D Vendor Evaluation Checklist
Step 5:   3D Project Charter
Step 6:   RFP Table of Contents for a 3D Project
Step 7:   3D Vendor Evaluation Scorecard
Step 8:   3D Project Resource Planning Template
Step 9:   3D Project Kickoff