THE CAD BUYER'S
DUE DILIGENCE CHECKLIST

Evaluate licensing, deployment, and
data ownership with confidence.

Choosing a new CAD solution is a major investment in your organization's future. For IT and procurement teams, the decision goes far beyond user licenses. It affects data ownership, infrastructure strategy, compliance, and long-term scalability.

This checklist helps you conduct due diligence before committing to a CAD solution, ensuring that your organization avoids costly surprises and maintains control over performance, security, and cost.

1. LICENSING OPTIONS

Compare how each vendor structures access and ownership.

Named user vs. shared licensing

Subscription vs. perpetual models

Hidden fees, mandatory add-ons, or upgrade requirements

Look for options that balance cost predictability with flexibility, especially for teams that scale up or down throughout the year.

2. DEPLOYMENT FLEXIBILITY

Evaluate where and how the CAD solution runs.

Cloud-only, hybrid, or on-premises options

Offline access and performance reliability

Compliance with ITAR, export controls, or regional data laws

Some cloud-only tools limit performance or restrict offline work, creating operational risk in controlled or high-security environments.

3. DATA SECURITY & OWNERSHIP

Your organization's IP is its most valuable asset. Confirm how it's stored, accessed, and controlled.

Role-based permissions and audit-trails

Backup, recovery, and redundancy capabilities

Data exportability and protection against vendor lock-in

Ask vendors: Can your team retain control of design data even if you change platforms or vendors?

4. SUPPORT & PROFESSIONAL SERVICES

Not all models all created equal. Compare:

Local VAR (Value-Added Reseller) vs. SaaS-only ticket systems

Access to onboarding, training, certification, and consulting services

Escalation paths for critical issues

Solutions with certified reseller networks often deliver faster, more personalized support and implementation success.

5. TOTAL COST OF OWNERSHIP (TCO)

Look beyond the initial quote.

License, add-ons, and upgrade costs

Promotional tendencies of the vendor

Hidden costs of migration and integration

Long-term TCO compared to "free" or low-cost alternatives

Low-entry tools can introduce higher downstream costs when teams grow or customization is required.

6. VENDOR STABILITY & MATURITY

Consider the partner behind the software.

Product roadmap transparency and release cadence

Community size and talent availability

Predictable pricing and long-term business viability

Stable vendors reduce long-term IT risk and ensure consistent platform evolution.

7. CLOUD COLLABORATION & PERFORMANCE

Understand how your teams will work day-to-day.

Real-time collaboration performance and version control

Latency and file management under different network conditions

Integration with enterprise identity management and IT systems

Solutions offering both desktop and cloud collaboration often provide superior performance and resilience across diverse work environments.

8. INTEGRATION WITH OTHER TOOLS

Access the broader ecosystem.

Compatibility with simulation, CAM, PLM, MBSE, ERP, and other systems

Ability to aggregate the tech stack and vendor relationships

Data flow across design, engineering, and manufacturing processes

API accessibility and support for custom integrations

The right CAD ecosystem connects seamlessly across your product lifecycle.

9. COMPLIANCE & REGULATORY CONSIDERATIONS

Ensure compliance with your industry's standards.

ITAR, ISO, or sector-specific security frameworks

Data residency, encryption and audit readiness

Support for documentation and traceability requirements

Be cautious of CAD platforms that store sensitive data exclusively on shared public clouds with limited governance options.

10. TALENT & TEAM IMPACT

Assess how your choice affects users and recruitment.

Learning curve and available training resources

Familiarity with the engineering talent pool

Retention impact for experienced users

A widely adopted CAD platform simplifies hiring, onboarding, and collaboration across distributed teams.

WHY THIS MATTERS

A CAD purchase means so much more to a company than designer license costs. You're supporting the course of the business for years to come.

Augment your research and decision making with this checklist. In the end, with every choice, there will be trade-offs, but if you ask the right questions, you can find the optimal solution.

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