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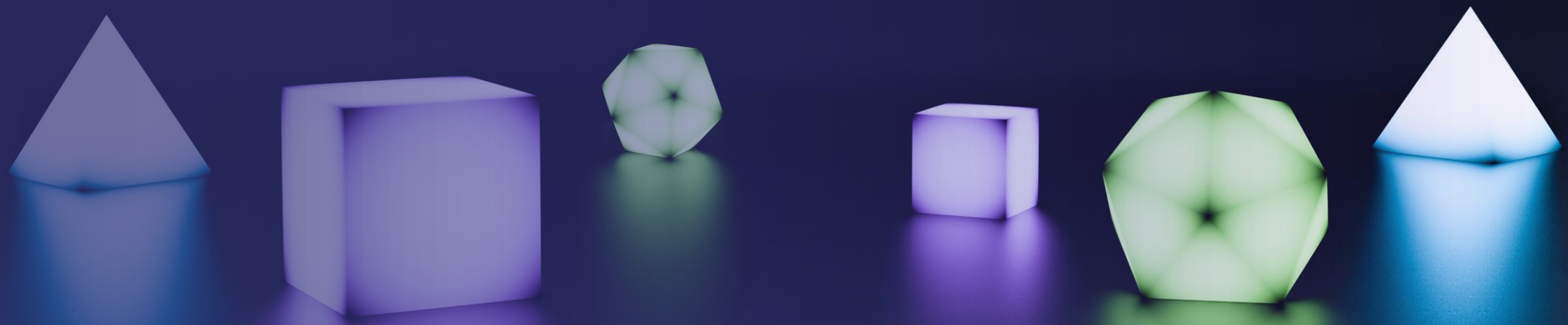
The future is now

Migrating to XM Cloud



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Today's speaker

Jason St-Cyr

Director, Developer Relations, Sitecore

- 4-time Sitecore MVP
- 6 years as a partner, 6 years at Sitecore
- My kids love Bluey and Doc McStuffins.
  D&D nerd and music lover
- **What I believe:** Be Honest. Be Kind. Be Helpful.

/in/jasonstcyr

@jasonstcyr@mstdn.ca

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The plan for today

What's different about XM Cloud?

Should you migrate?

Scenarios

1. XM Jamstack
2. Classic MVC
3. Marketing / Email Automation
4. XP "Global Brand"

Things to look for

Resources and Q&A

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Sitecore User Group Conference – SUGCON India 2023

The Grand New Delhi

Thursday 24 August –

Friday 25 August

- 200+ attendees
- Gain knowledge and get inspired
- Community speakers and Sitecore product teams
- Beginner and advanced level topics and presentations
- More information: india.sugcon.events

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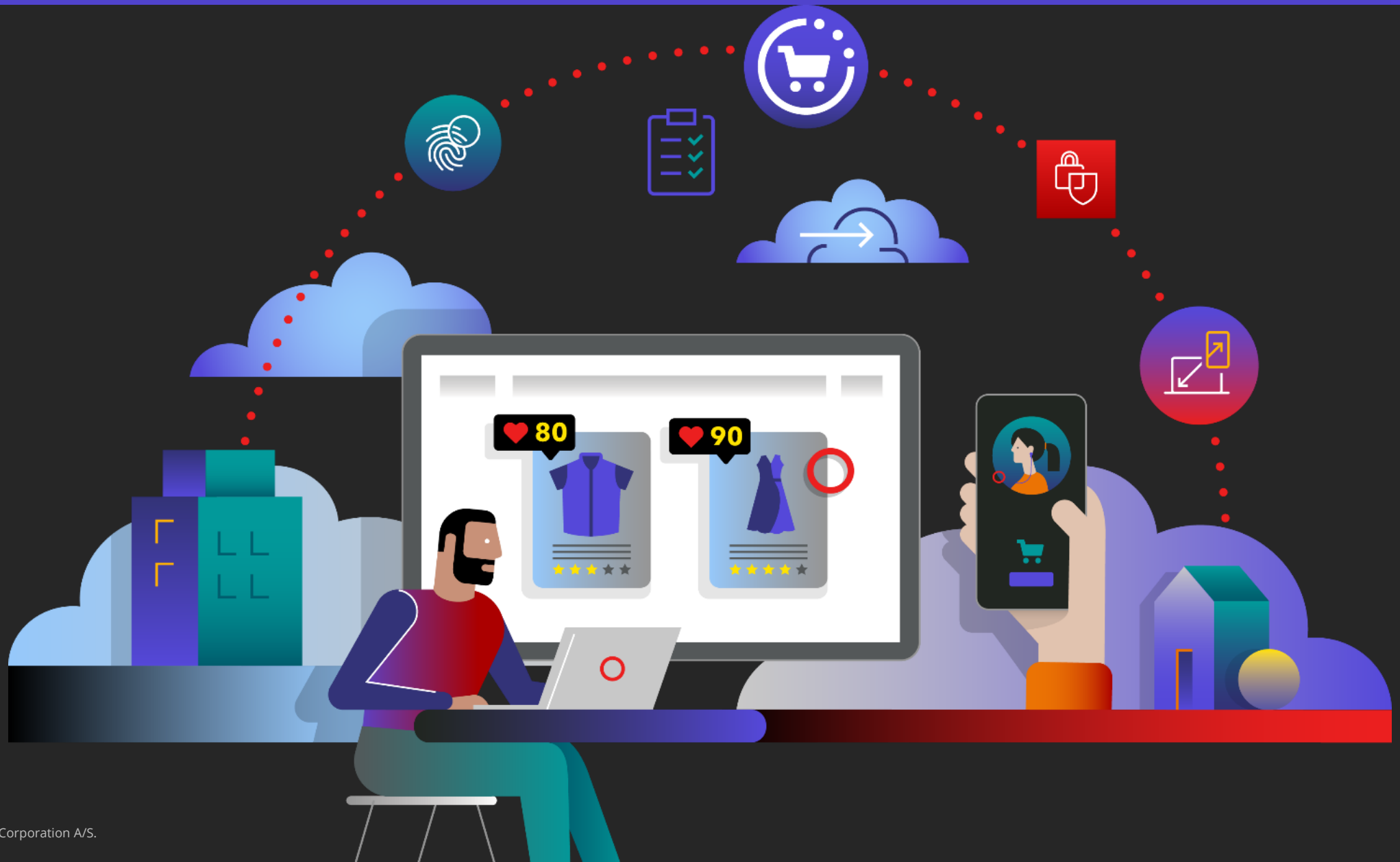
What's different about XM Cloud



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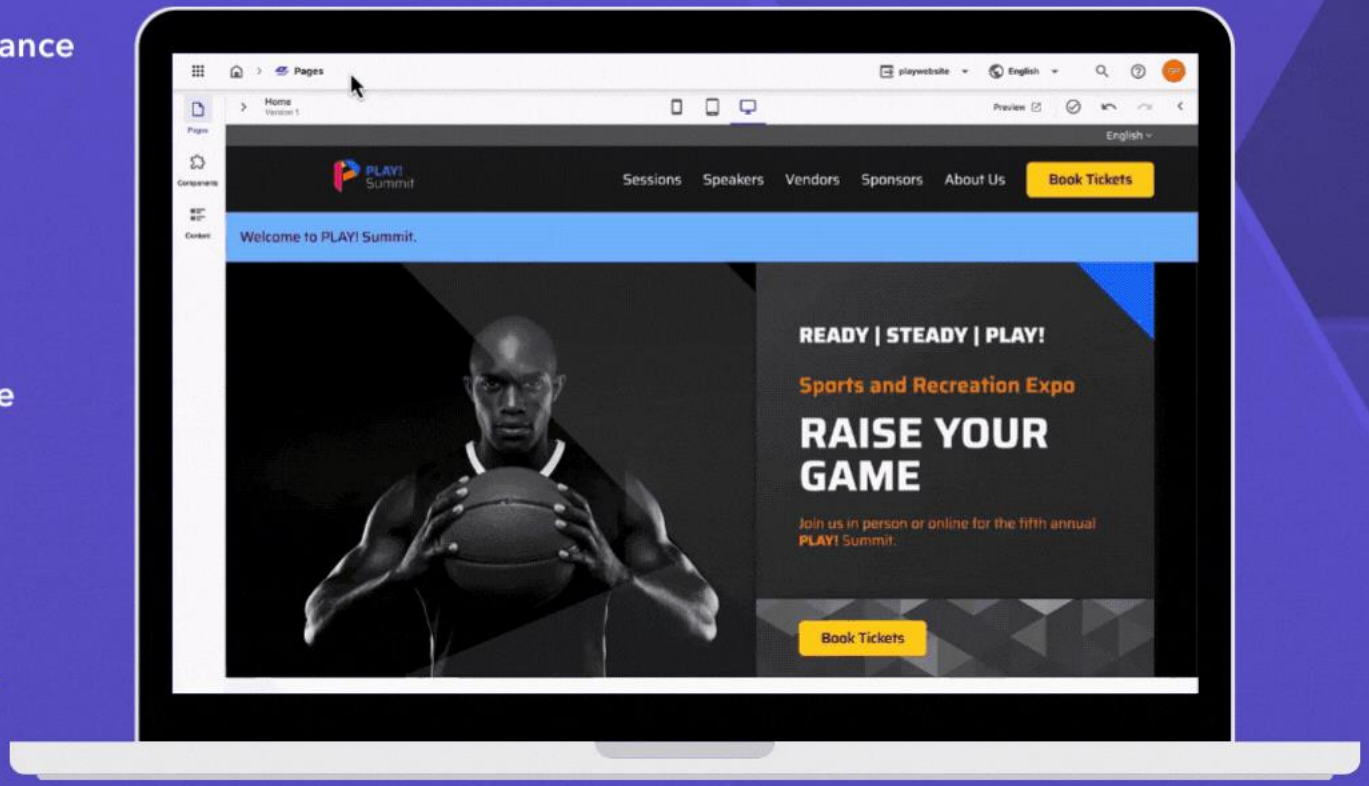
Why choose XM Cloud?

Reduce site maintenance and technical development costs

Reduce infrastructure costs

Future upgrade cost avoidance



Improve marketer productivity

Increase conversions or leads

Choose from best-of-breed stack

Only on XM Cloud

Going cloud native with proven technology

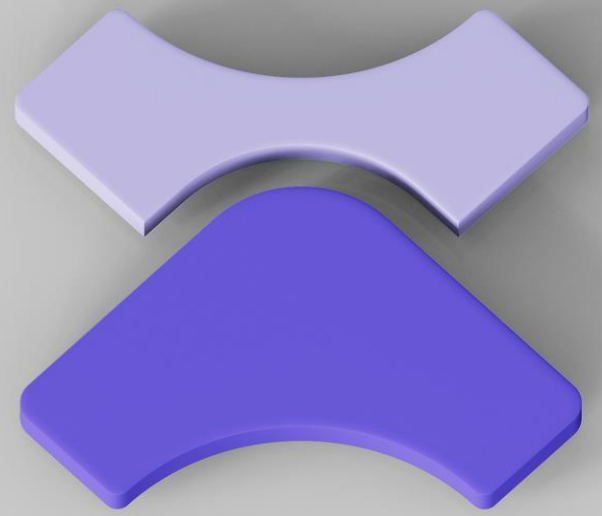
Cloud-hosted portal to manage all your deployments, projects and environments

Sitecore Pages to provide rich and modern content authoring tools

Sitecore Component Builder to build low-code experiences for any site

Embedded headless Personalization and Analytics powered by Sitecore Personalize

Automatic updates to keep the solution compliant and on the latest features



Should you migrate?

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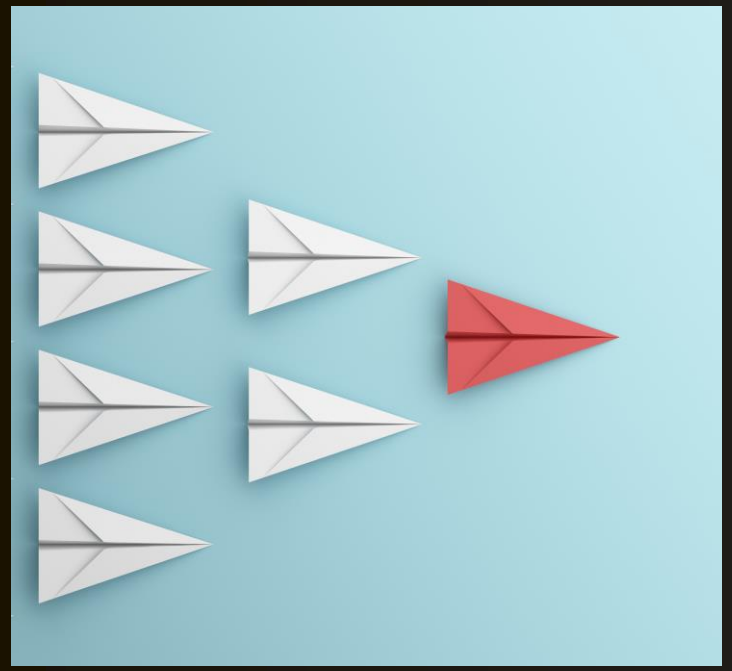
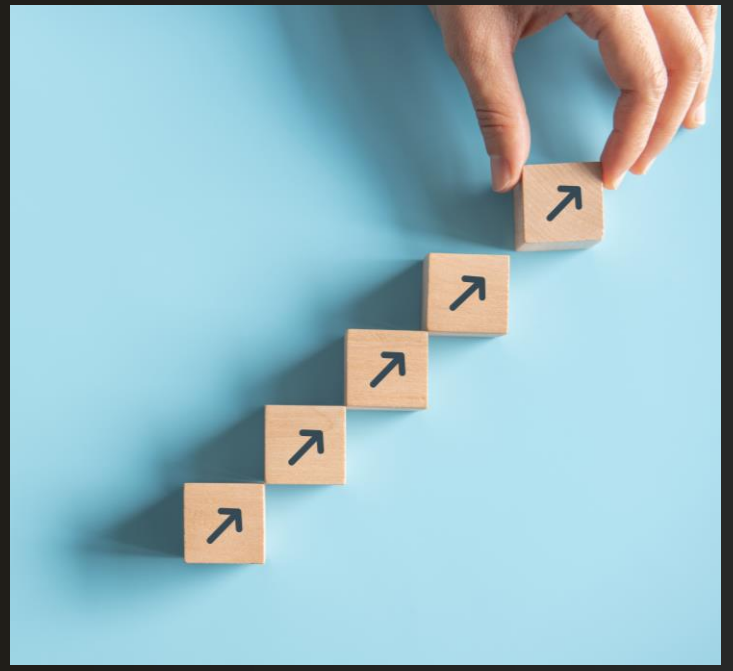
Common profiles for XM Cloud migration

The Early Adopter



The Maintainer



The Modernizer

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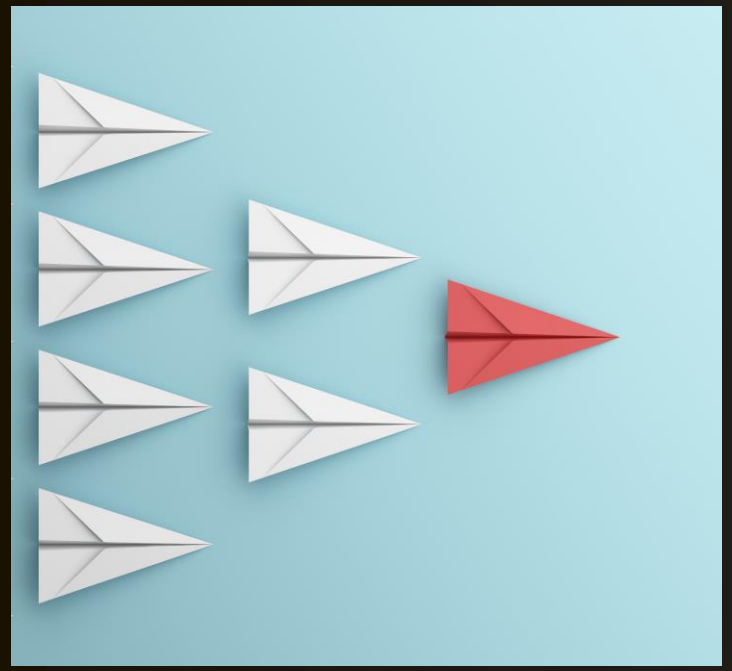
Common profiles for XM Cloud migration

The Early Adopter



- Already builds headless architectures
- Uses cloud-native “best-of-fit” solutions
- Needs to align Sitecore solutions with composable strategy in their stack

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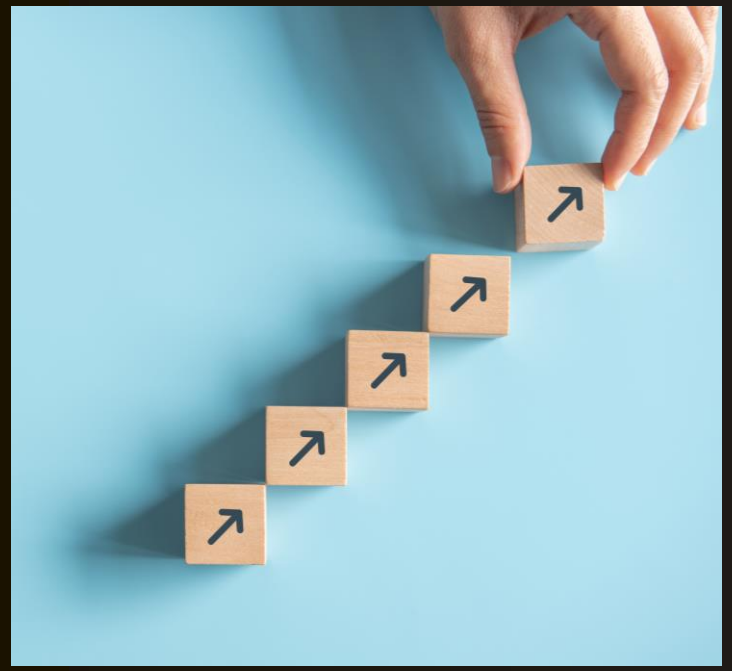
Common profiles for XM Cloud migration

The Maintainer



- Keeps up to date on Sitecore XM/XP
- Likely on an older non-headless architecture
- Wants to transition to a SaaS platform and stop owning application upgrades

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Common profiles for XM Cloud migration

The Modernizer

- On an older version of Sitecore XM/XP
- A long time since investment in their current site
- Concerned about application End of Life
- Wants to reduce steps needed to modernize

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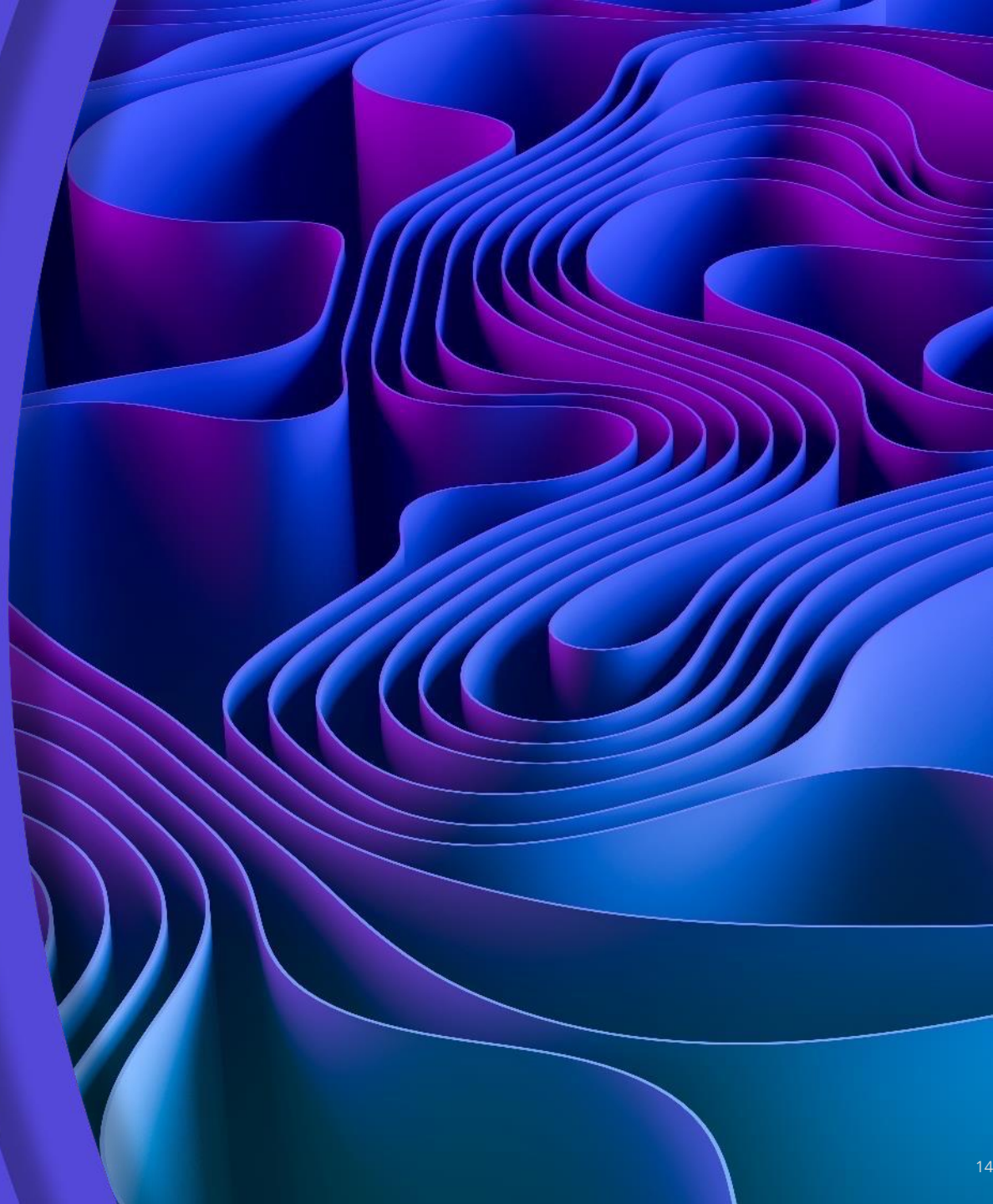
Scenarios



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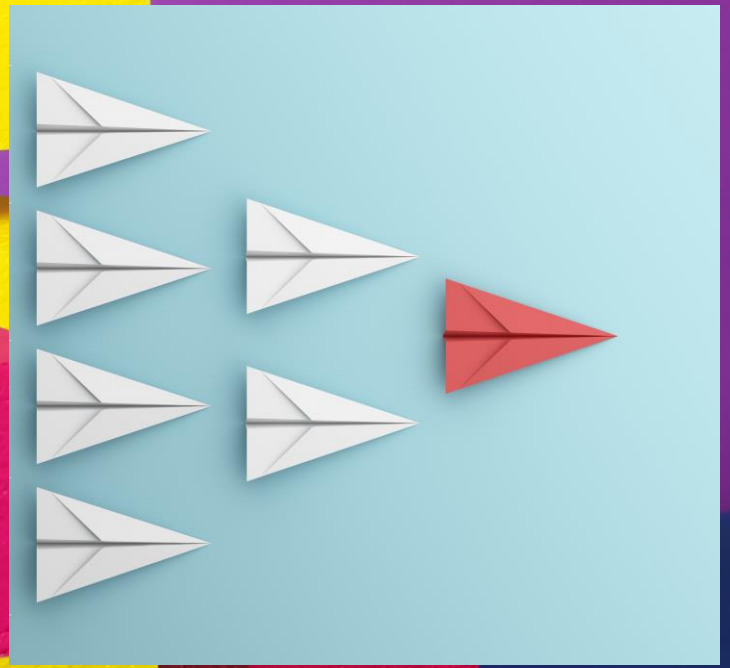
Scenario 1: XM “Jamstack”

A team is keeping up with the latest and greatest, and are excited to move to a Composable option and never upgrade again.

Profile: Early Adopter



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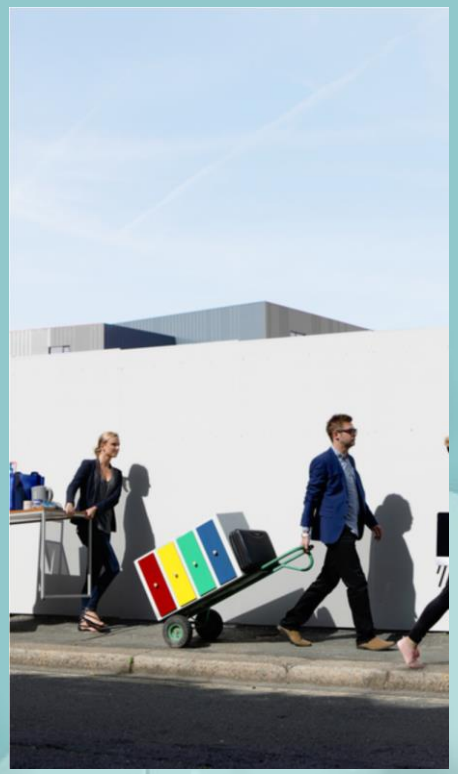
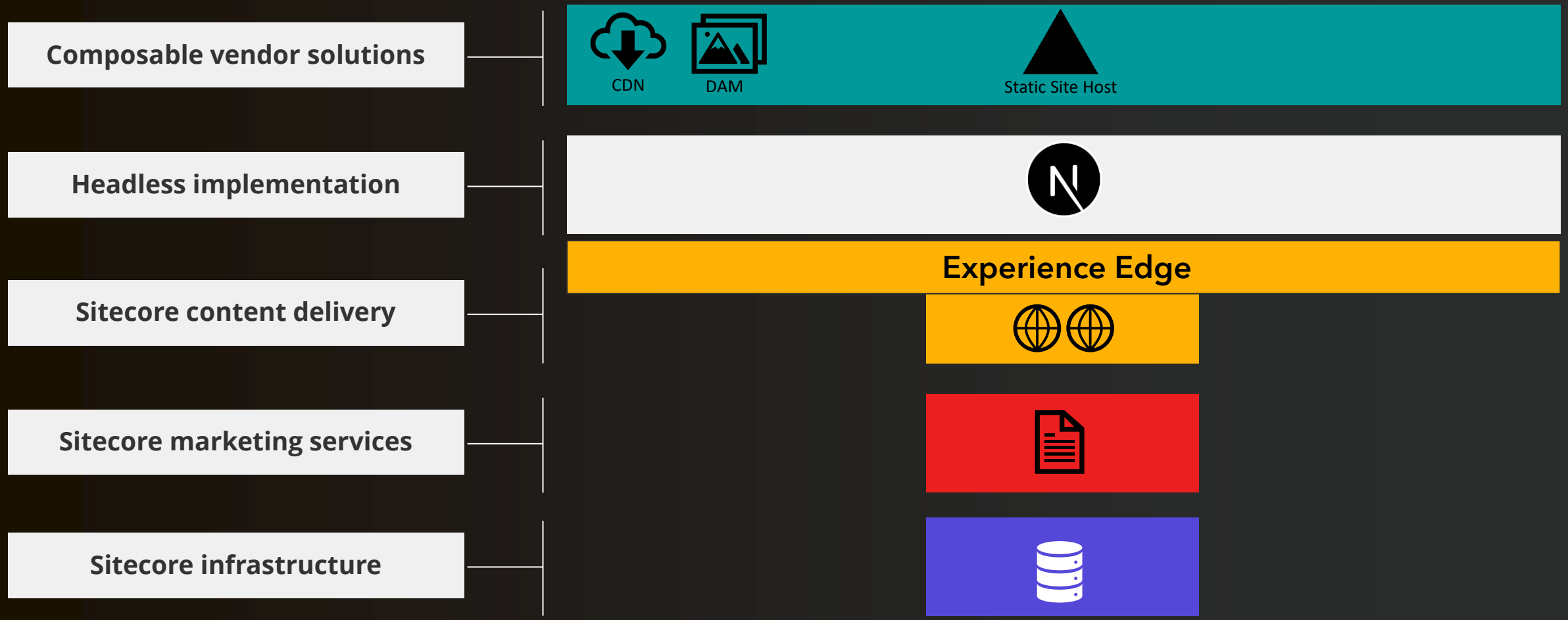
XM Jamstack: The Migration Plan

Step 1
Migrate solution to XM Cloud



Step 2
Launch XM Cloud and retire existing

What does the solution look like?



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Jamstack in XM Cloud

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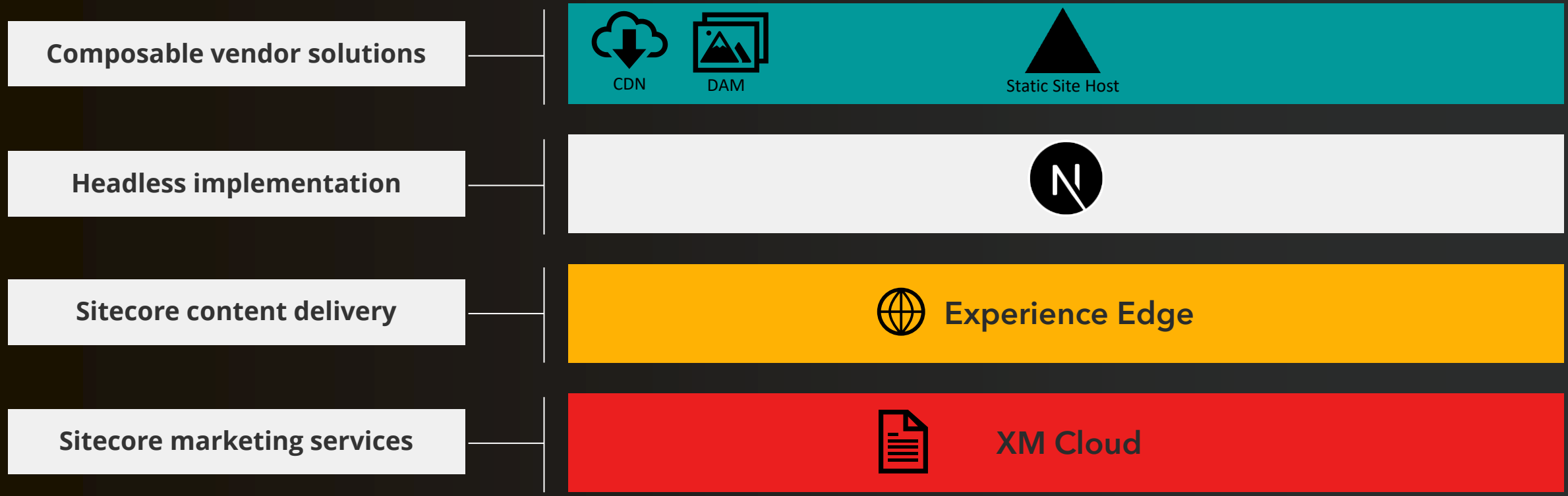

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Scenario 2: Classic MVC

A simple personalization solution built on Sitecore MVC renderings

Profile: Modernizer

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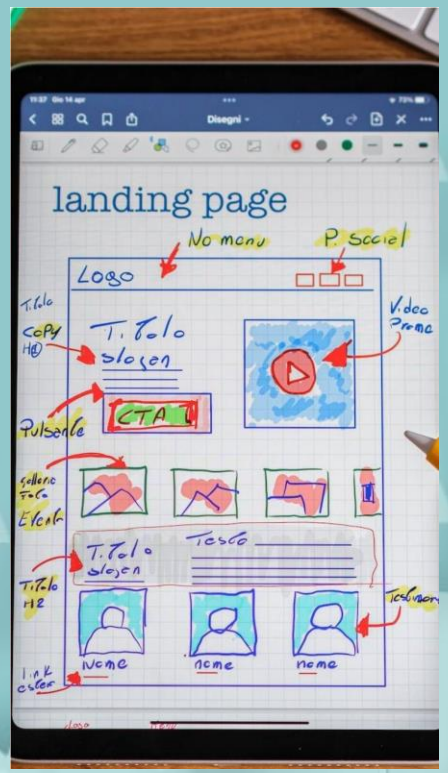
Classic MVC: The Migration Plan

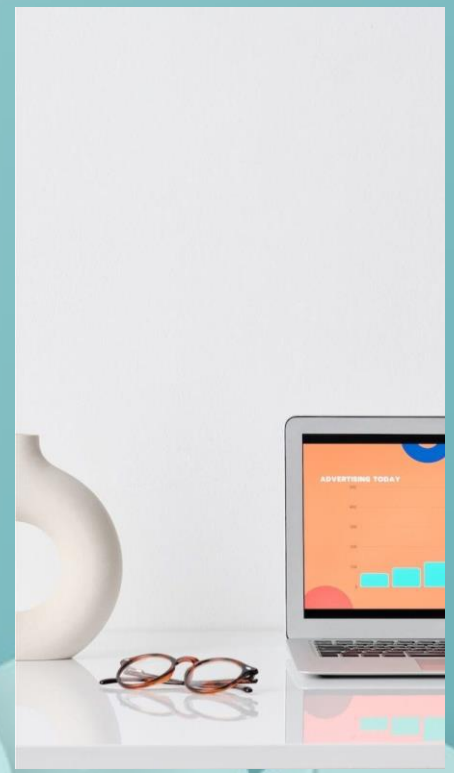
Step 1
Migrate content to XM Cloud

Step 2
Build new design on XM Cloud

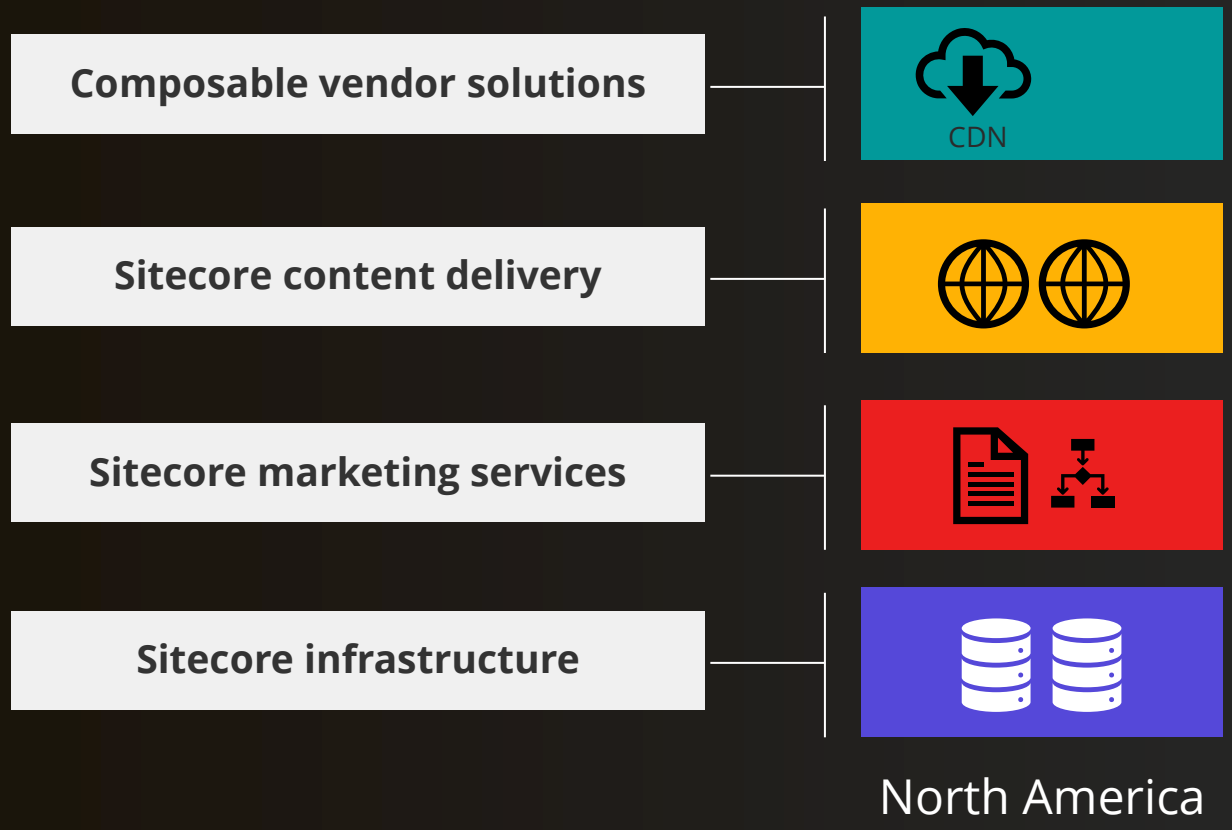


Step 3
Launch XM Cloud and retire existing

Step 4
Implement personalization



What does the solution look like?



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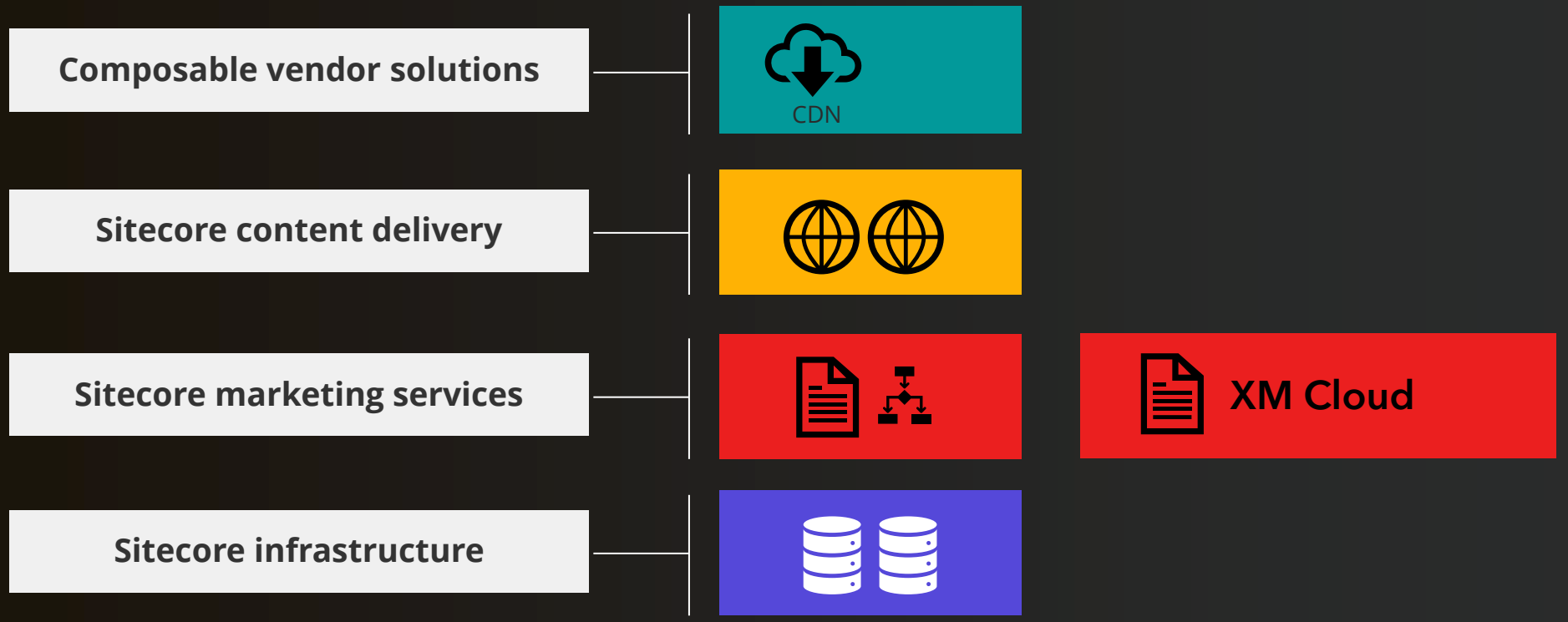
Step 1: Migrate content to XM Cloud



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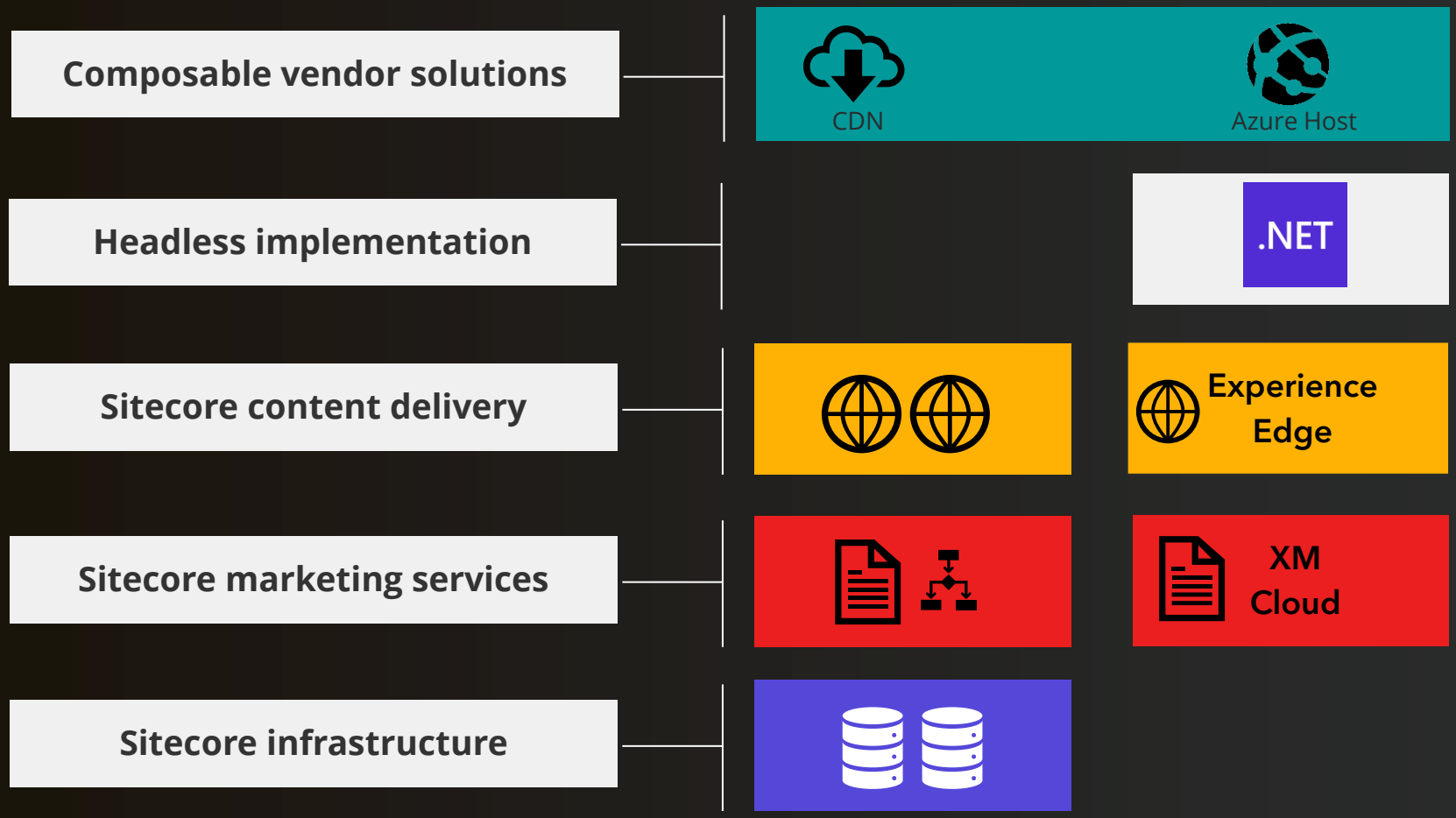
Step 2: Implement new design on XM Cloud



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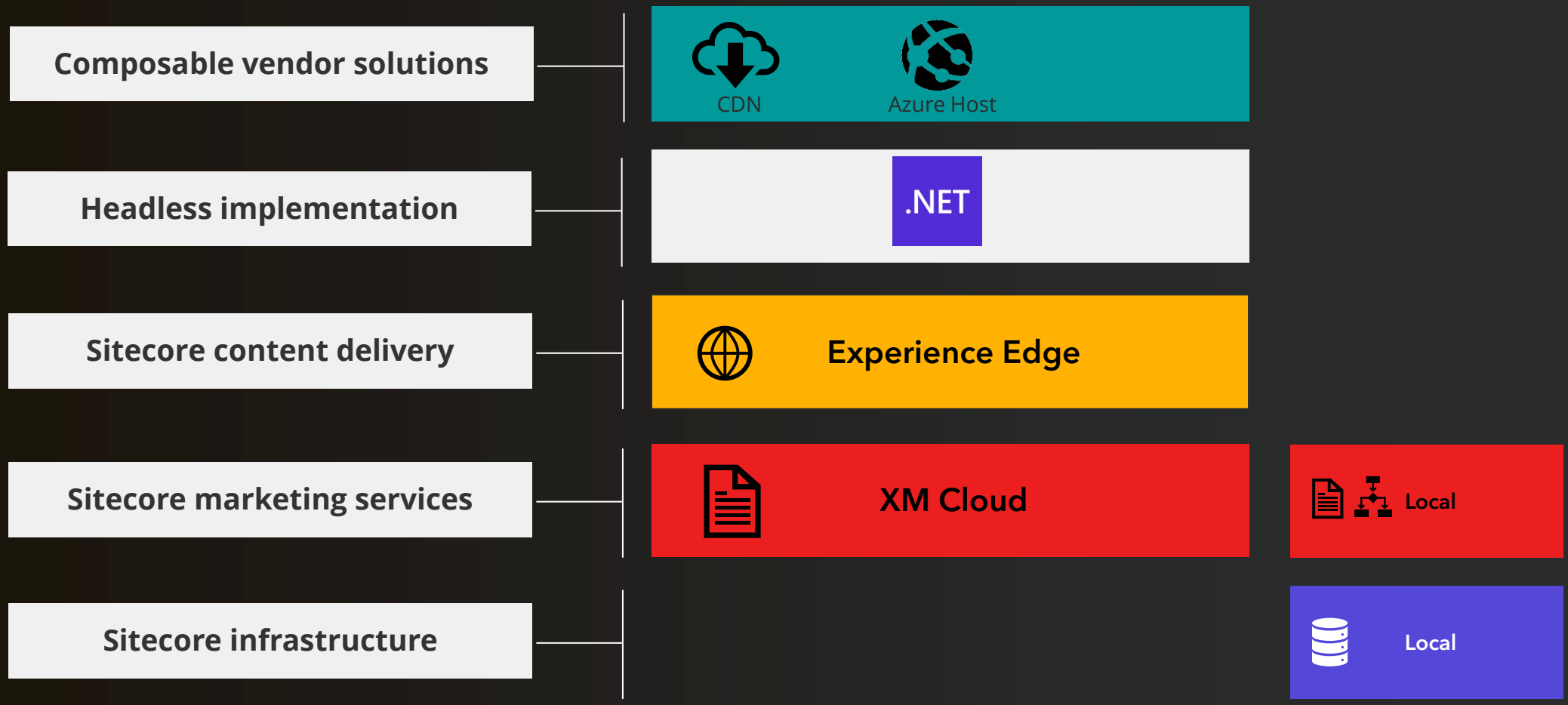
Step 3: Switch XM Cloud to production



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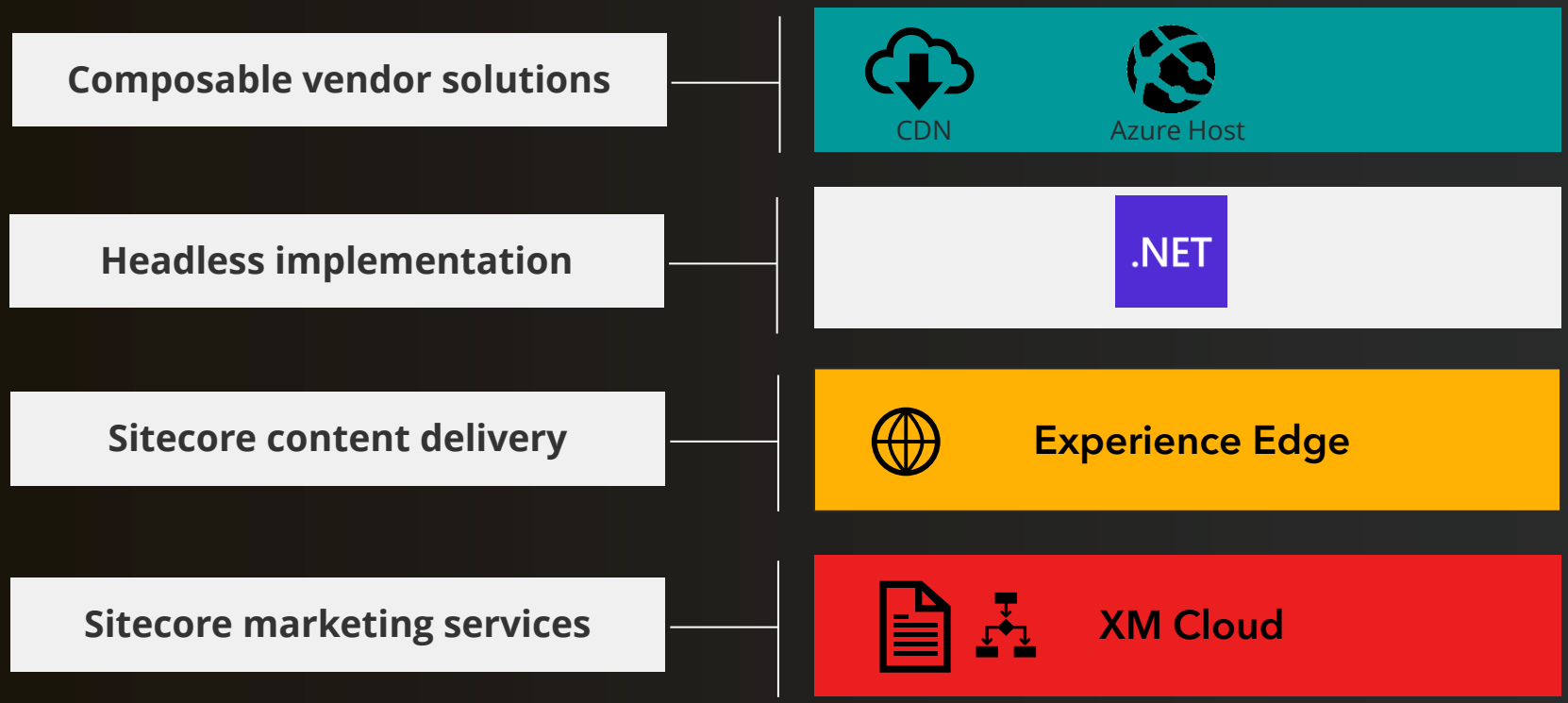
Step 4: Implement personalization variants



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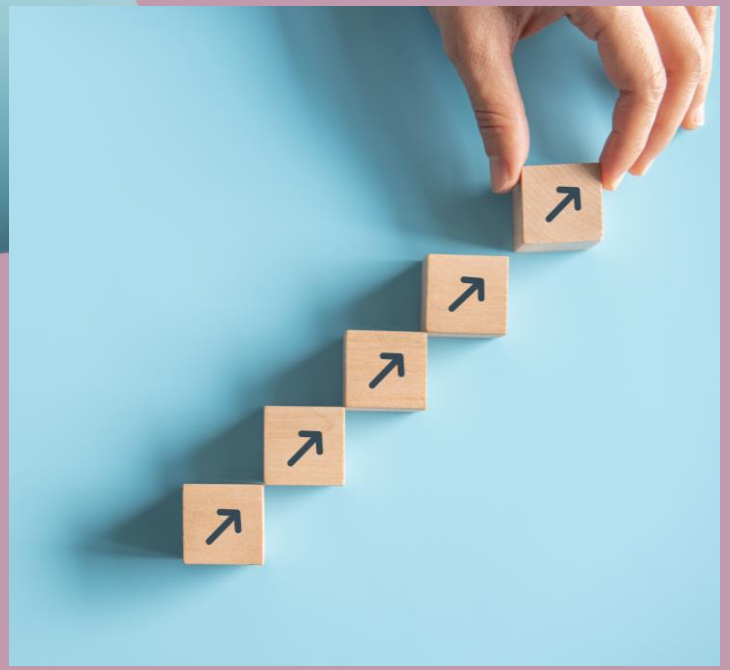
Scenario 3: Marketing / Email Automation

Audience engagement is key for this team and they use EXM and Marketing Automation to reach their customers.

Profile: Maintainer



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Marketing / Email Automation: The Migration Plan

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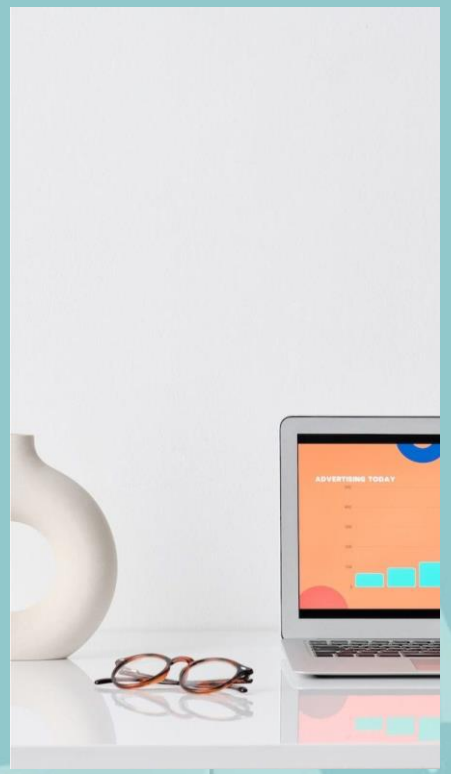
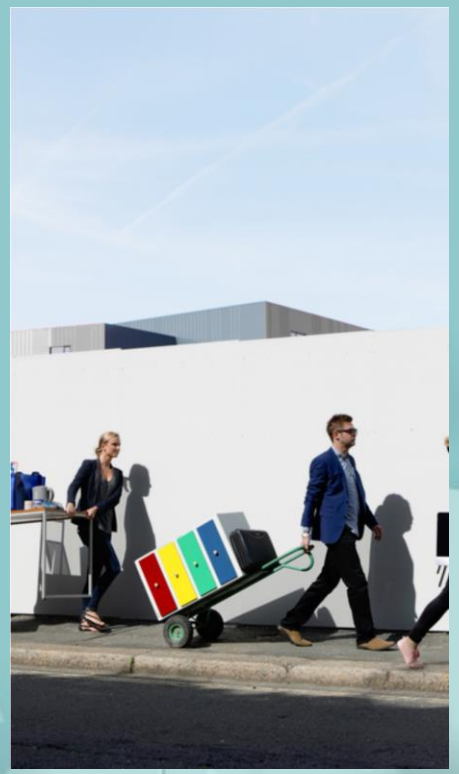
Step 1
Start tracking with Personalize



Step 2
Migrate to Send/Personalize

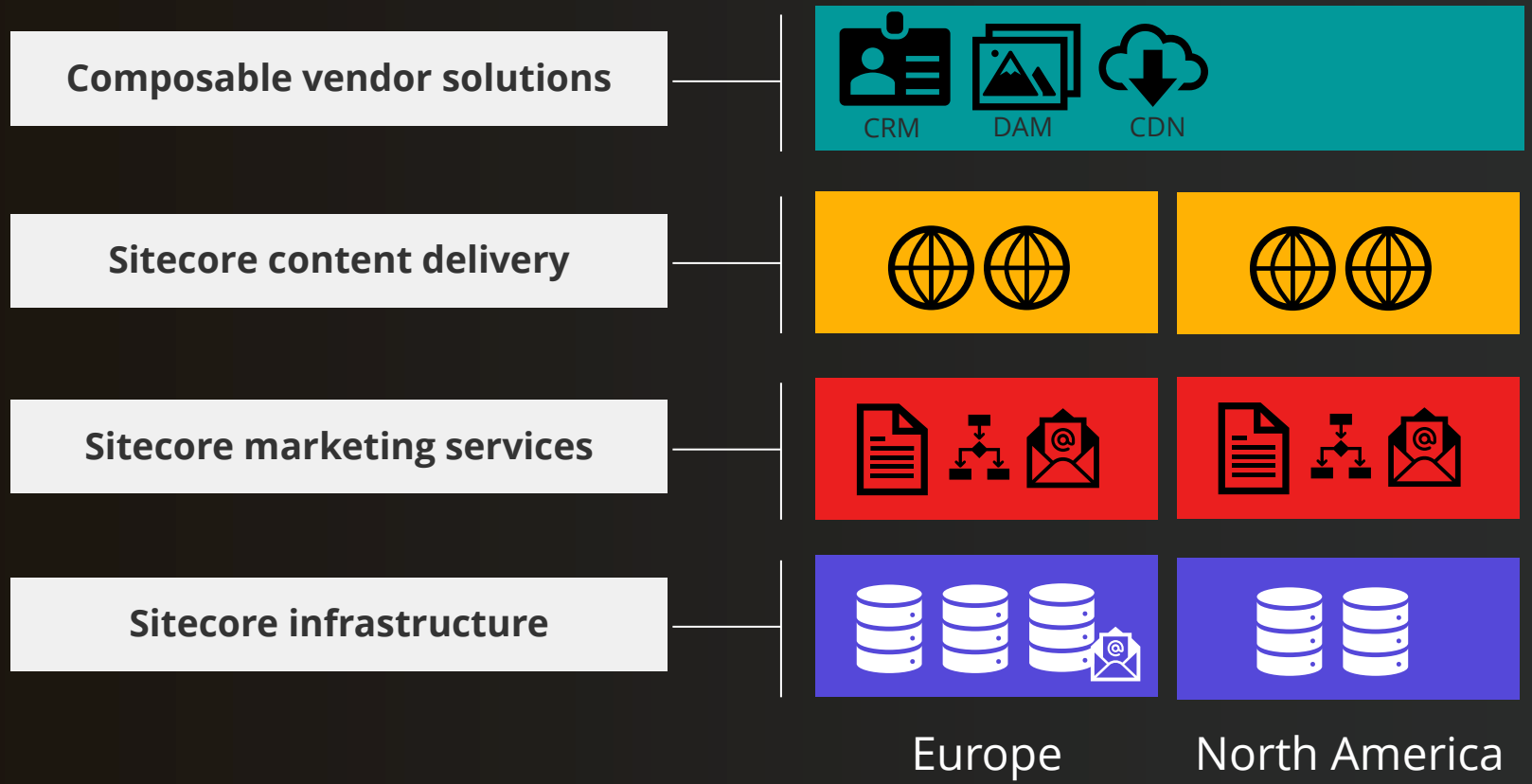


Step 3
Go to the Edge and headless

Step 4
Migrate to XM Cloud

Step 5
Launch XM Cloud and retire XM

What does the solution look like?



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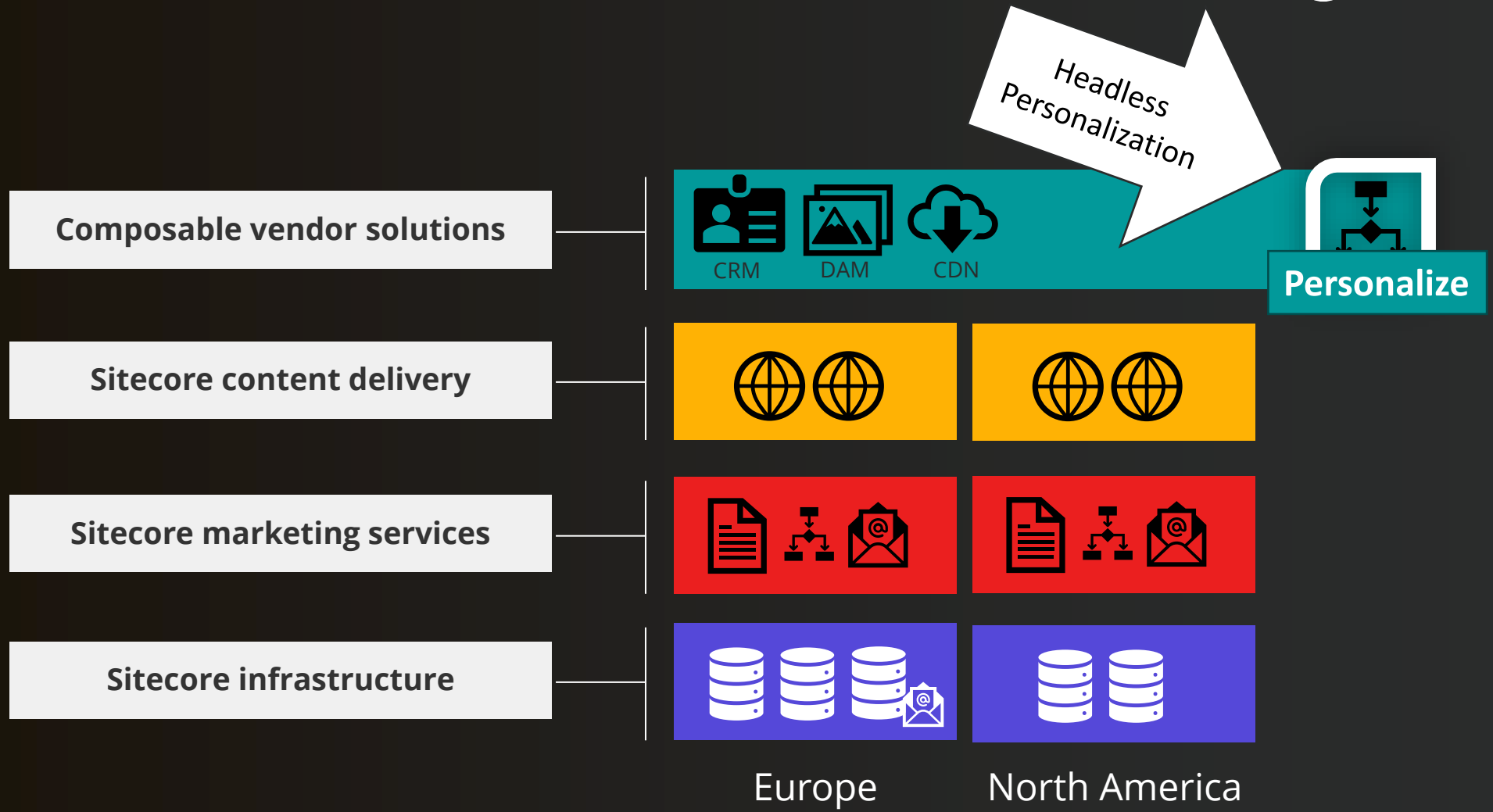
Step 1: Track with Personalize



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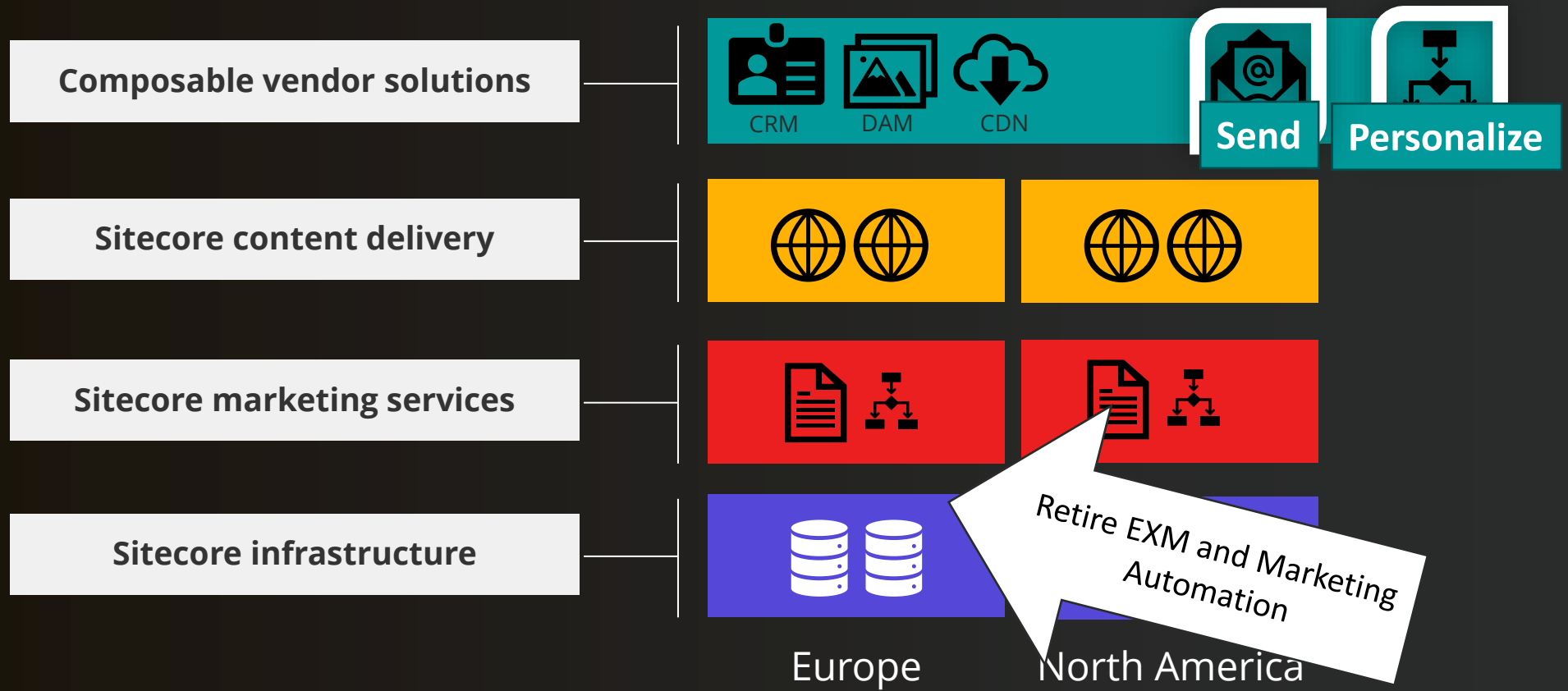
Step 2: Migrate EXM and Marketing Automation to Send



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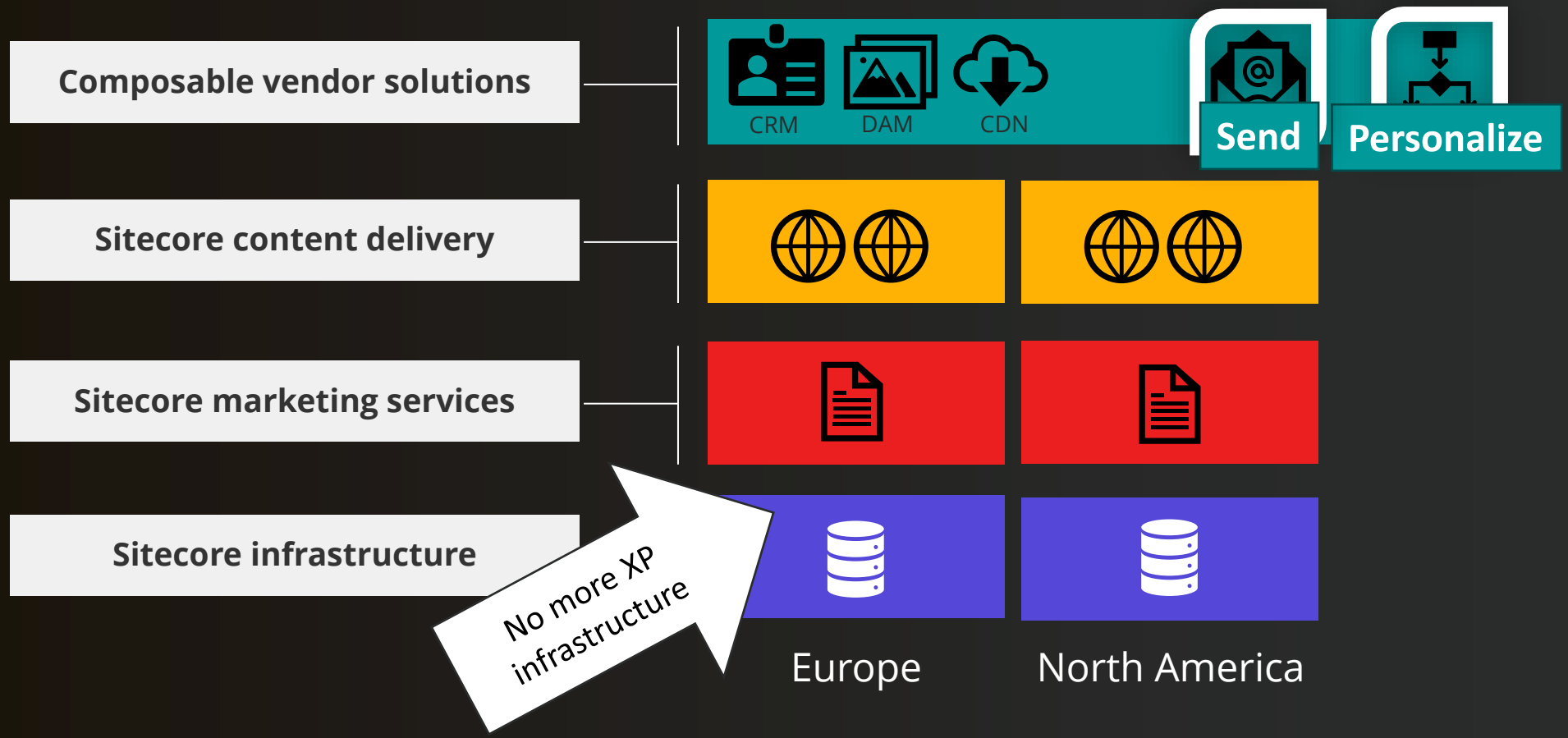
Step 3: Migrate to Personalize and transition to Sitecore XM



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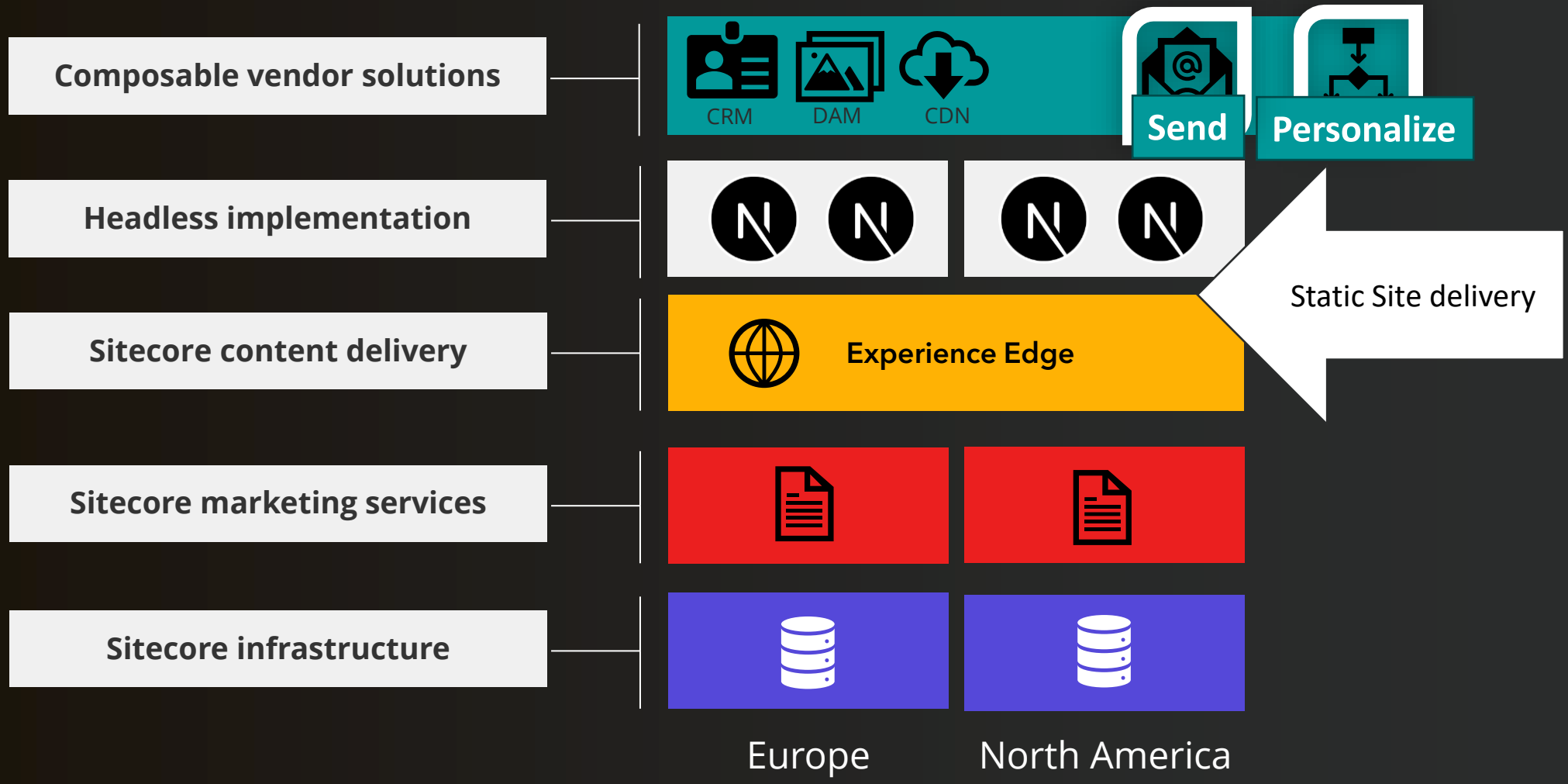
Step 4: Go to the Edge and Migrate to Next.js JSS



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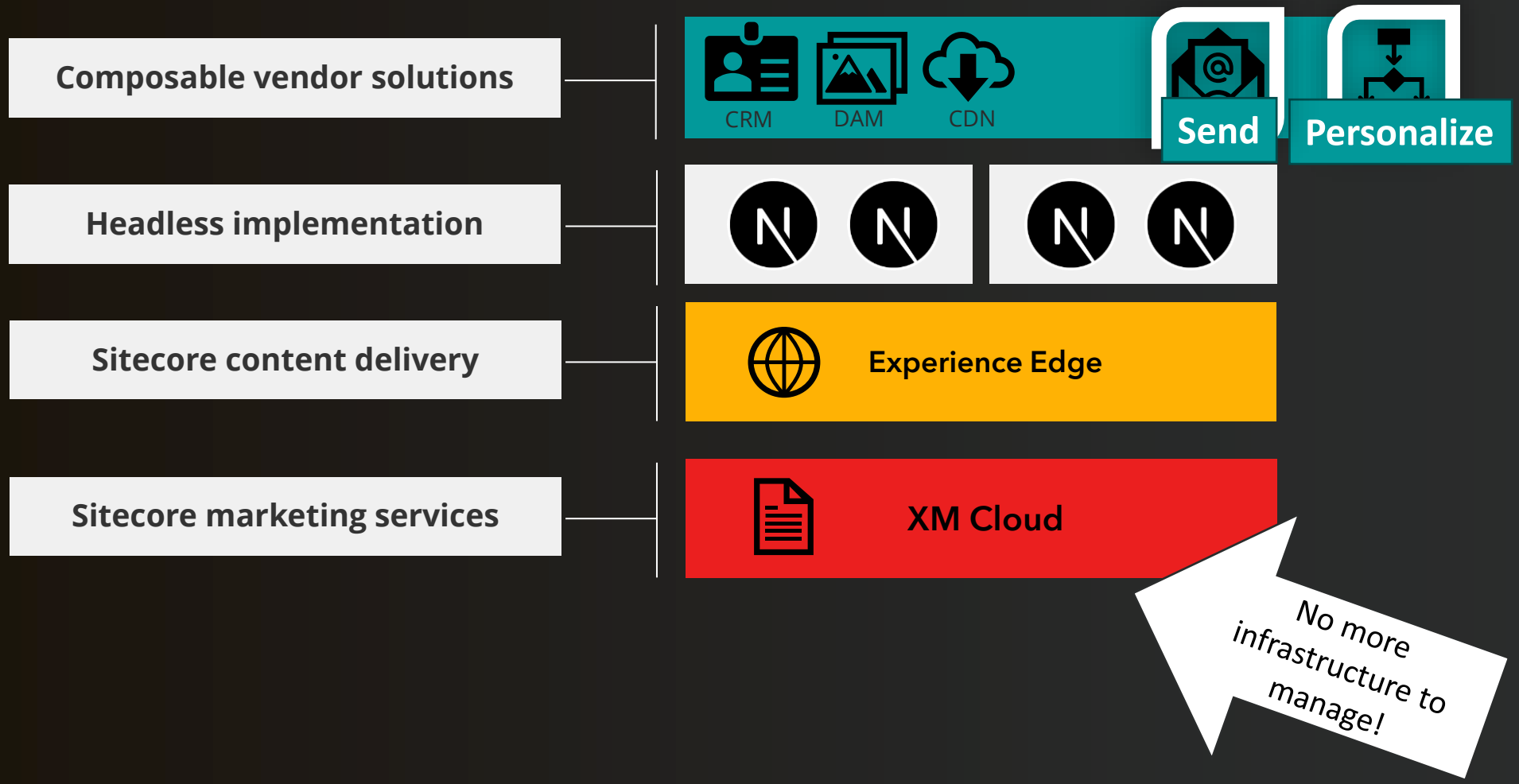
Step 5: Migrate to XM Cloud



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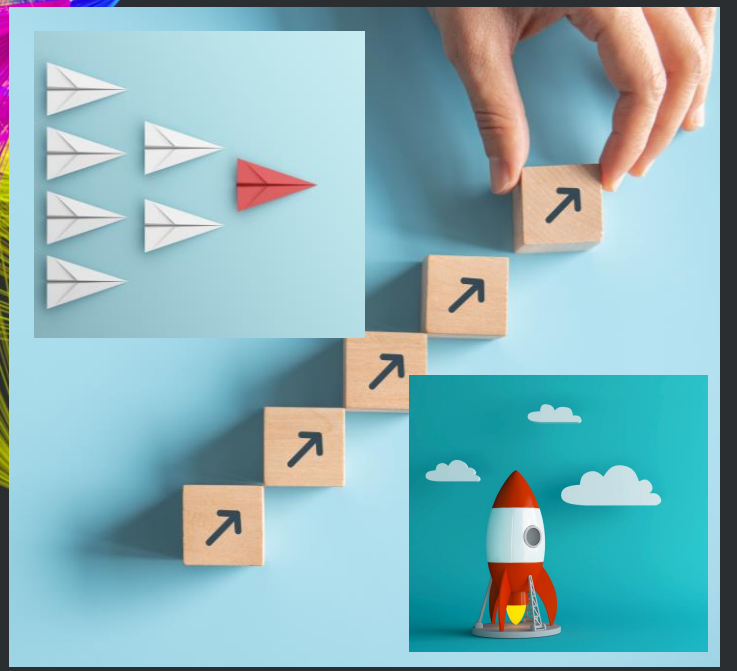
Scenario 4:
XP “Global Brand”

All around the world teams are working together on hundreds of sites with multiple production solutions and technologies.

Profile: Mixed



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Global Brand: The Migration Plan

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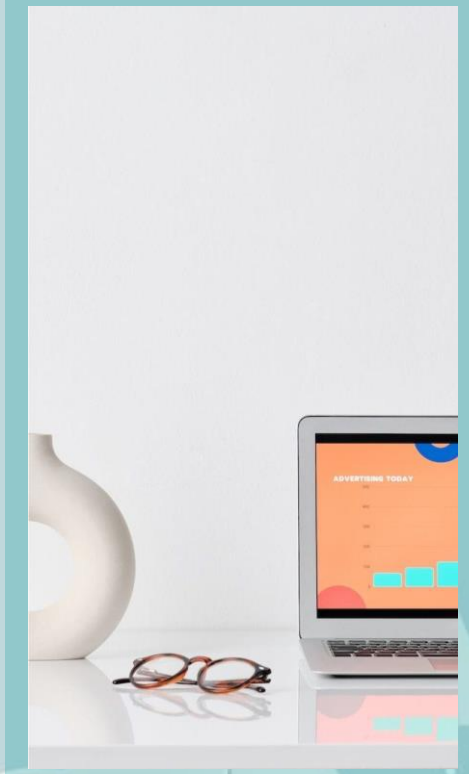
Step 1
Start tracking with Personalize



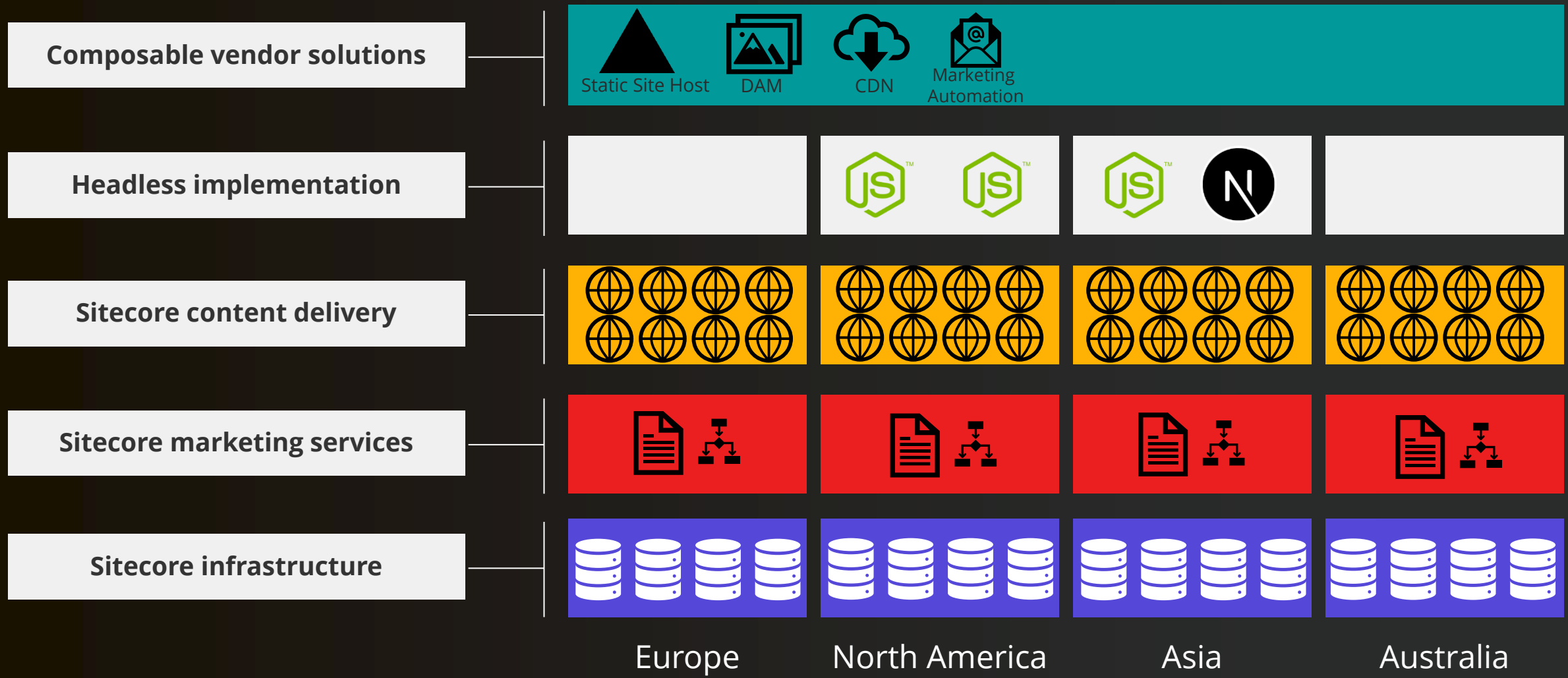
Step 2
Go to the Edge and headless

Step 3
Transition to XM and retire XP

Step 4
Fully adopt Next.js JSS

Step 5
Launch XM Cloud and retire XM

What does the solution look like?



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Step 1: Track with Personalize

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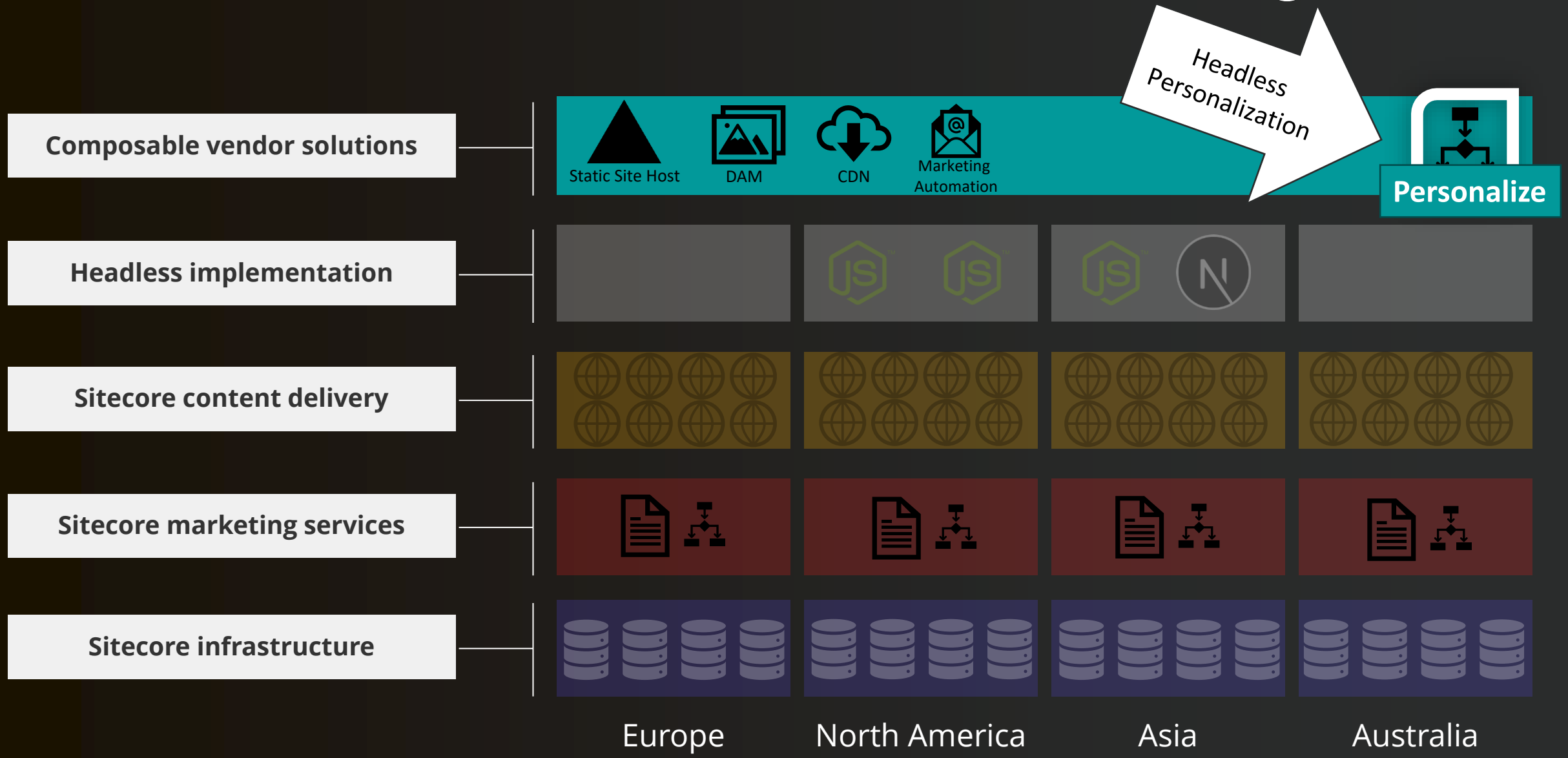

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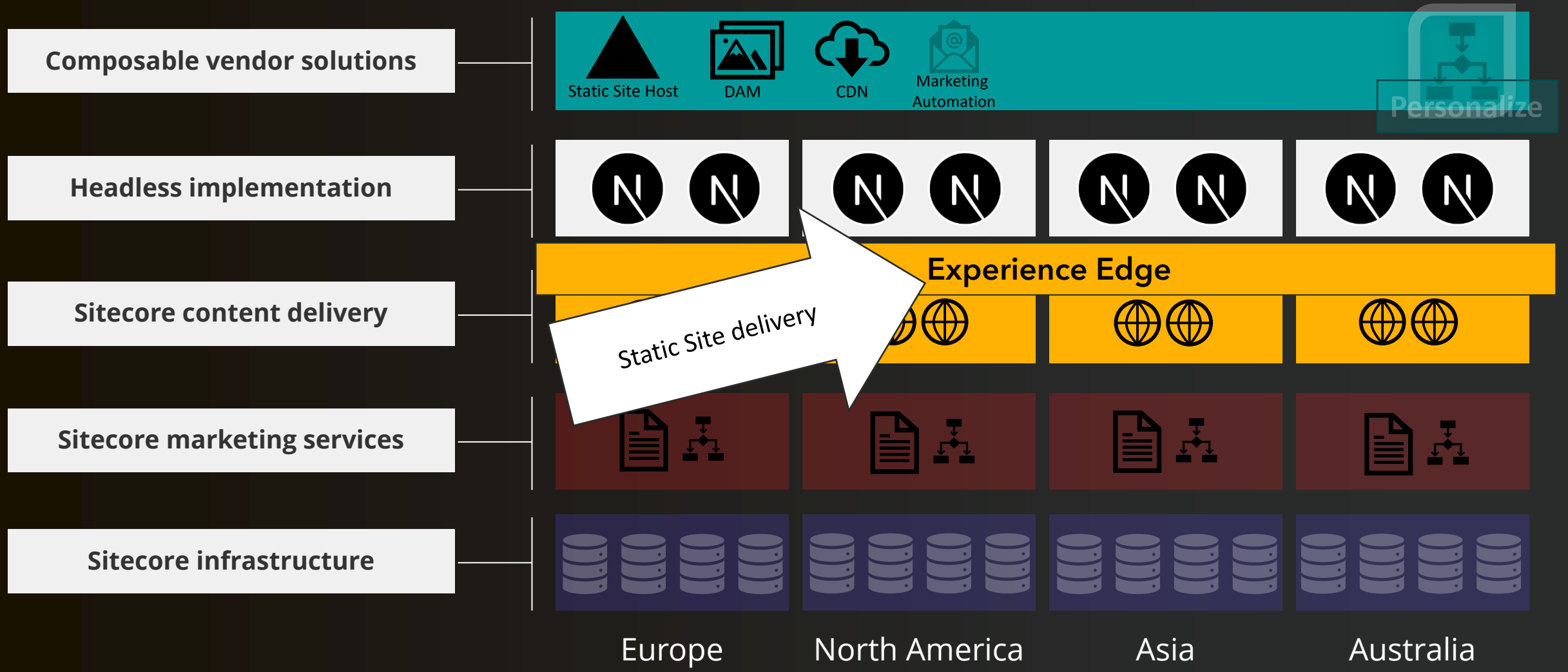
Step 2: Go to the Edge



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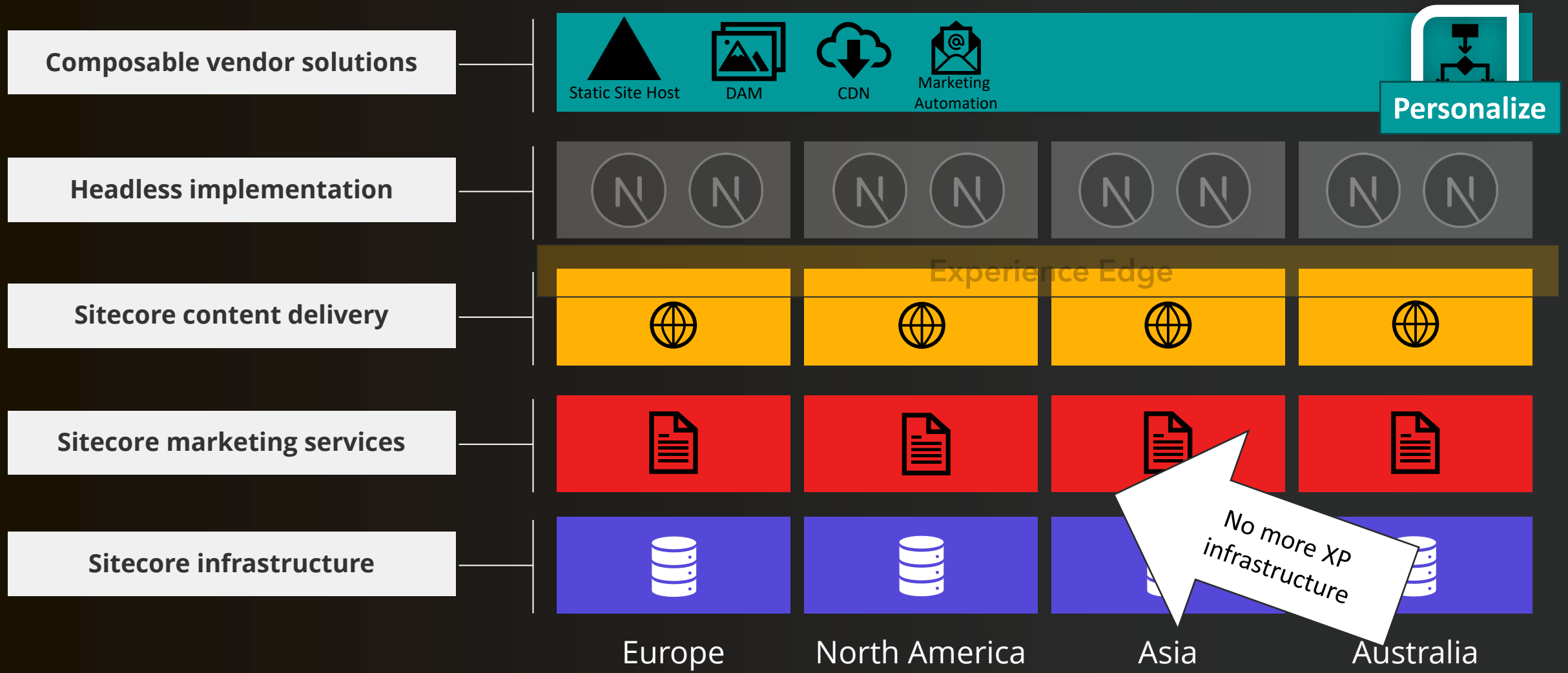
Step 3: Transition to XM



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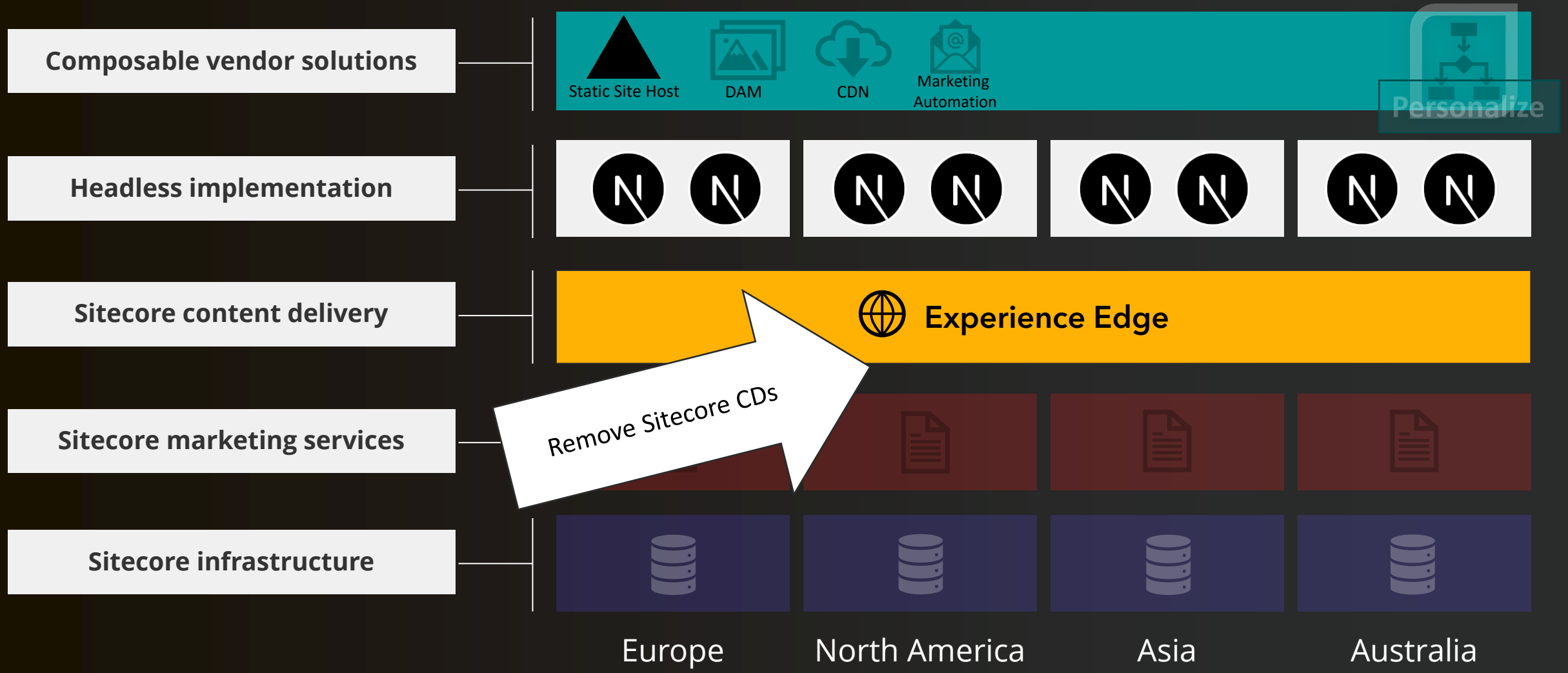
Step 4: Migrate to Next.js JSS



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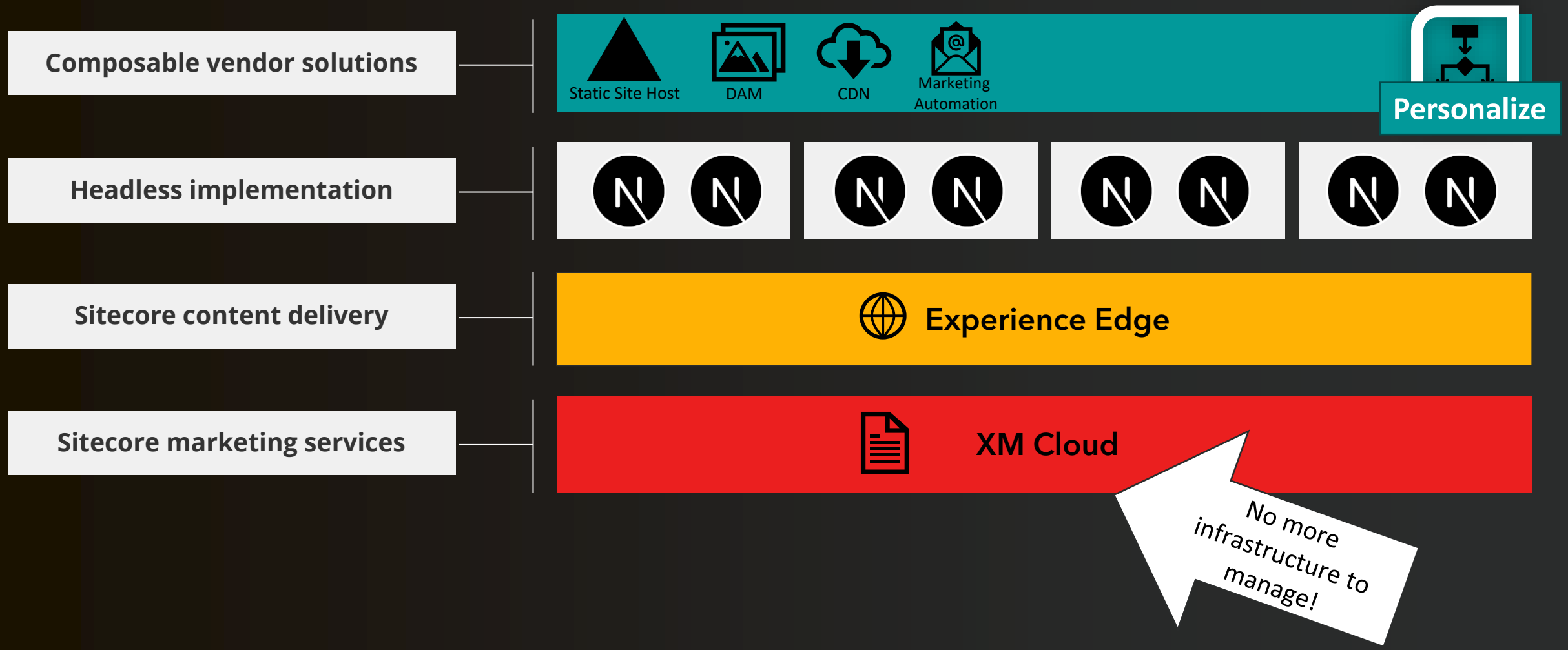
Step 5: Migrate to XM Cloud



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Things to look for

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Content migration

Content migration is never “trivial”

- Sitecore Content Serialization can help move content to XM Cloud
- More tools on the way to help with content migration
- Most current content models should be compatible
- Gradual migration could mean multiple content migrations (XP ➞ XM, XM ➞ XM Cloud)

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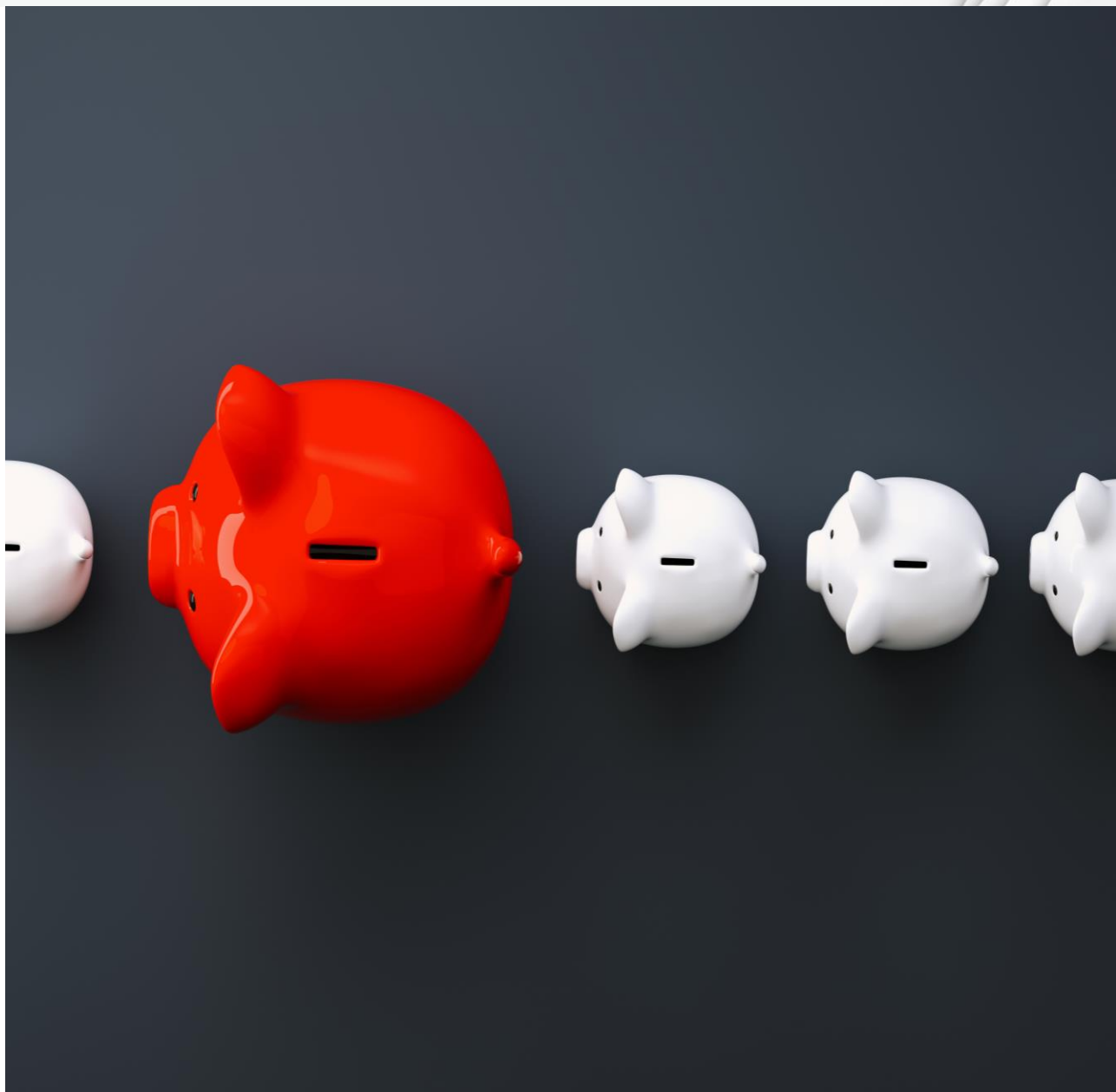
Not all customizations are compatible

XM Cloud and Edge are different from Content Delivery instances

- Customizations for pipelines running on Content Delivery are likely not compatible
- Solve in a headless way on your head
- Modules for Content Delivery instance will not execute on requests
- No XP features, so XP modules will not work on XM Cloud

Recommendation: analyze and remove Content Delivery customizations and modules.



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.NET or Next.js ?

Some things are easier with Next.js

- XM Cloud Embedded Personalization and the Engage SDK were built specifically for Next.js. Need to capture page view events directly using the SDK.
- Documentation, content, examples mostly focus on Next.js

Some things are easier with .NET

- Existing .NET Core Headless can transition easier than a rewrite to Next.js
- Teams with mostly .NET developers may find it easier to build in .NET and fill the holes than ramp up on skills

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XM Cloud or Personalize?

XM Cloud has personalization and analytics built in, but is it enough?

- Do customers need historical personalization beyond 30 days?
- Custom rules?
- Integration to external data systems?
- Identity resolution? Pattern cards?
- More than 8 page variants / 5 conditions?

Know the limits of XM Cloud when migrating an existing solution!

Is it in the 30%?

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Migrating to Personalize

Personalize is not XP

- Requires digital strategy to figure out how to achieve the same business goals
- xDB data migration may not have a good ROI in all cases, especially if xDB was not system of record
  - Identify which data is critical to move and only move that data
  - Does early tracking get enough data to skip xDB migration?

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Migrating to Personalize

Two systems of personalization

- Gradual migration means running Personalize and XP at the same time
  - More complex data reporting
  - Confusion debugging personalization from two sources
- Try to migrate full sections or sites to avoid having XP and Personalize conflicting.

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Is static publishing a shortcut?

SSG without rebuilding MVC/SXA

- Starting with Sitecore XP 10.2 SSG publishing
- Smaller lift to get better core vitals
- Not all sites are a fit
- Best fit for content-only simple sites that need a quick initial move
- Might require an upgrade if on an older Sitecore XM/XP version

Best bet is running fully headless to prep for XM Cloud

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Migrating EXM to Send

EXM is not Send

- Different vision on solving email automation.
  - Not a migration, full replacement
  - No import of templates
  - Can migrate some data like contact lists
- Send personalization can tailor messages, so can EXM, but they are done differently
- Website or other channels likely need updates to trigger Send APIs instead
- Send has no xDB, need to integrate to your source of truth for customer data

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Migrating EXM to Send

Where is the complexity?

- **Content Delivery** or **XP/EXM Dispatch?**
- Tackle the infrastructure complexity first

- **Complex global CD infrastructure?**
  - Target move to headless and static first
  - Then reduce down XP and EXM

Remember to warmup your new email service!

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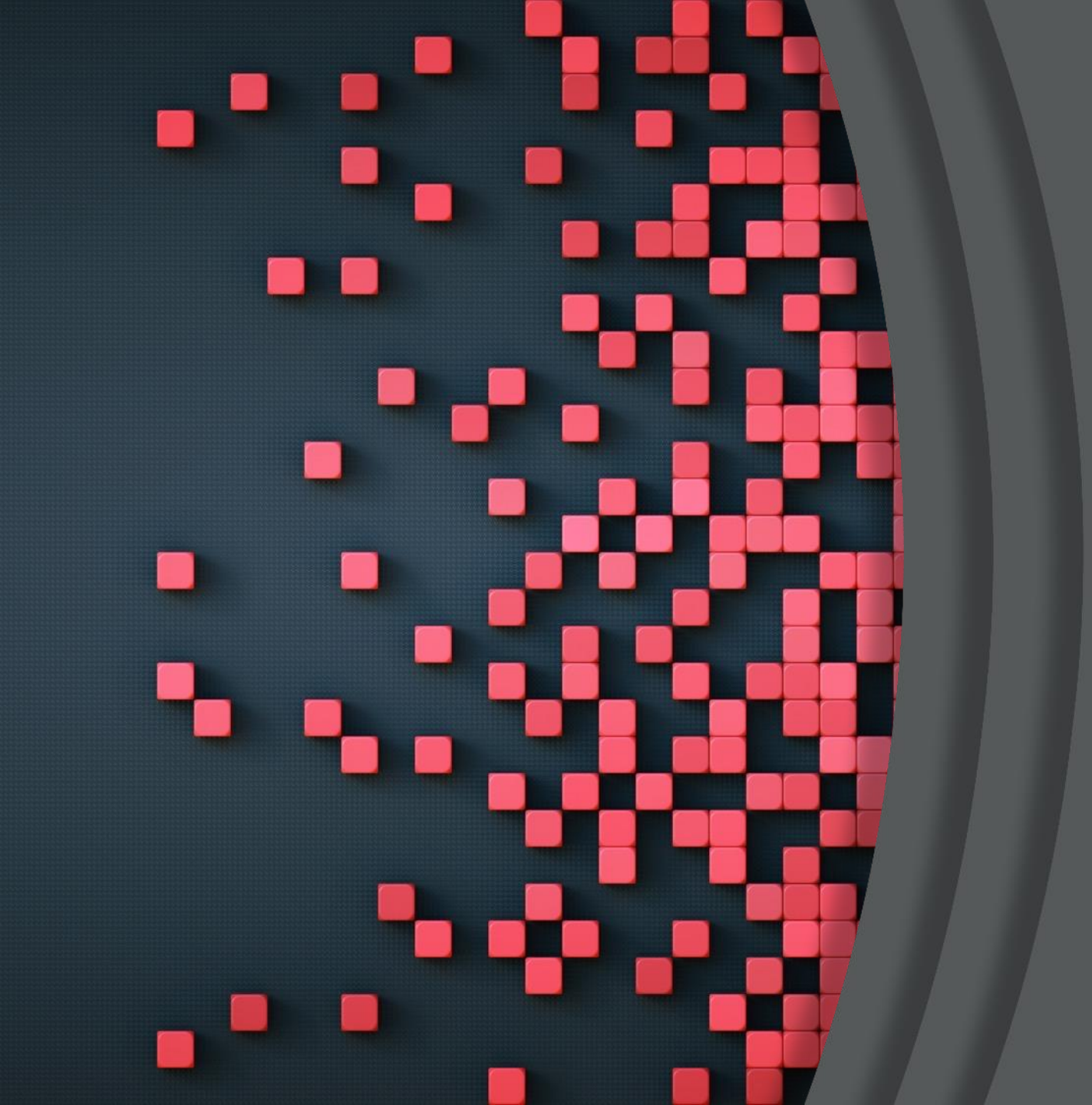

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Some helpful resources

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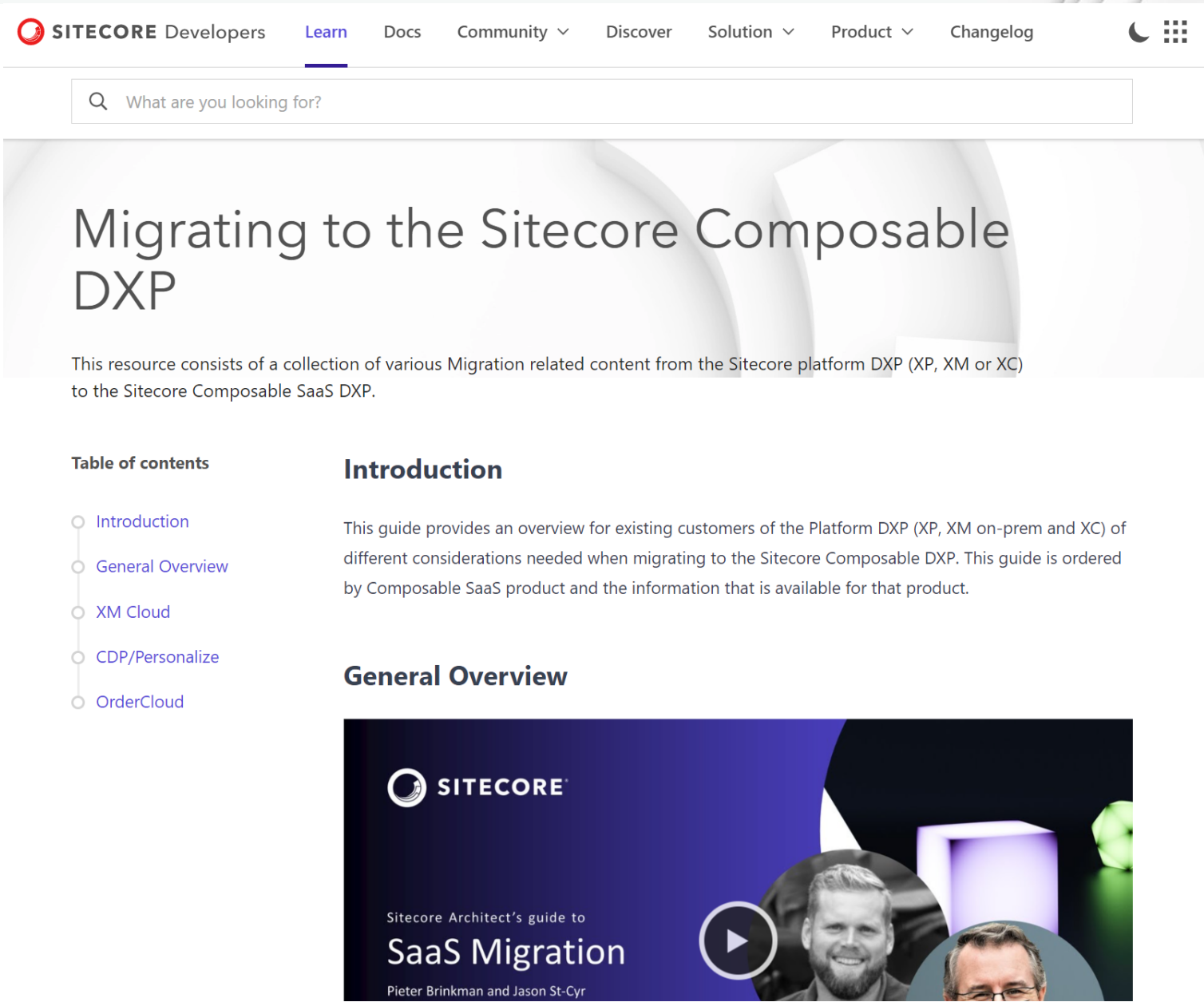
Migration to Sitecore Composable DXP landing page

Collection of articles and tools that guide help customer start with their migration.

Content published:

- 4 customer scenarios
- Example repository
- Article series documenting our journey of migrating the MVP site
- Details on migrating to CDP and Personalize
- Article series on migrating from XC to Order Cloud

https://siteco.re/migrationguides



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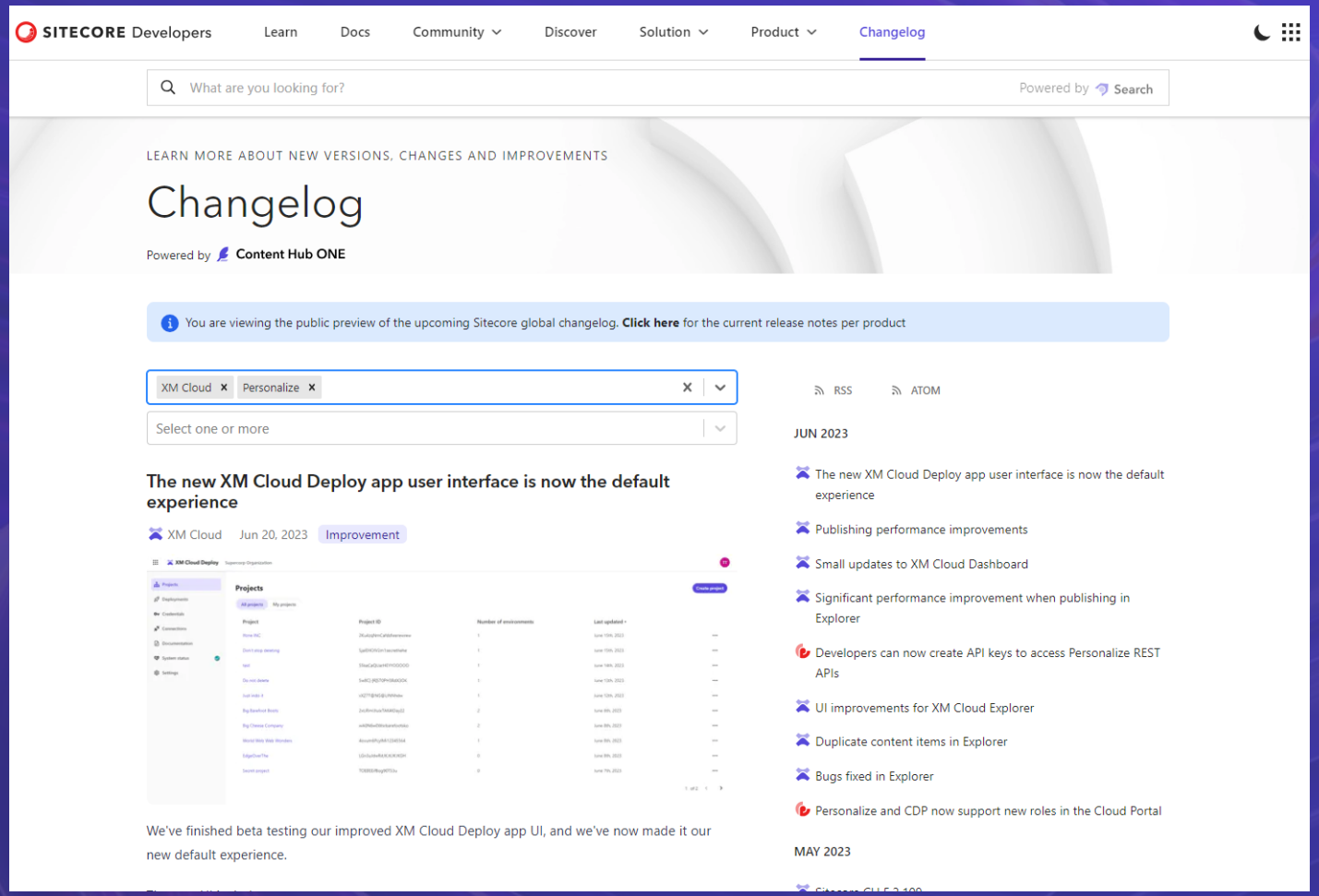
DEVELOPER RELATIONS

MODERN SAAS RELEASE NOTES



Changelog features 6 products!

- Latest changes from XM Cloud, Content Hub ONE, Search, Discover, Personalize, and CDP

- Powered by Content Hub ONE
- RSS and Atom feeds for audience notification

developers.sitecore.com/changelog

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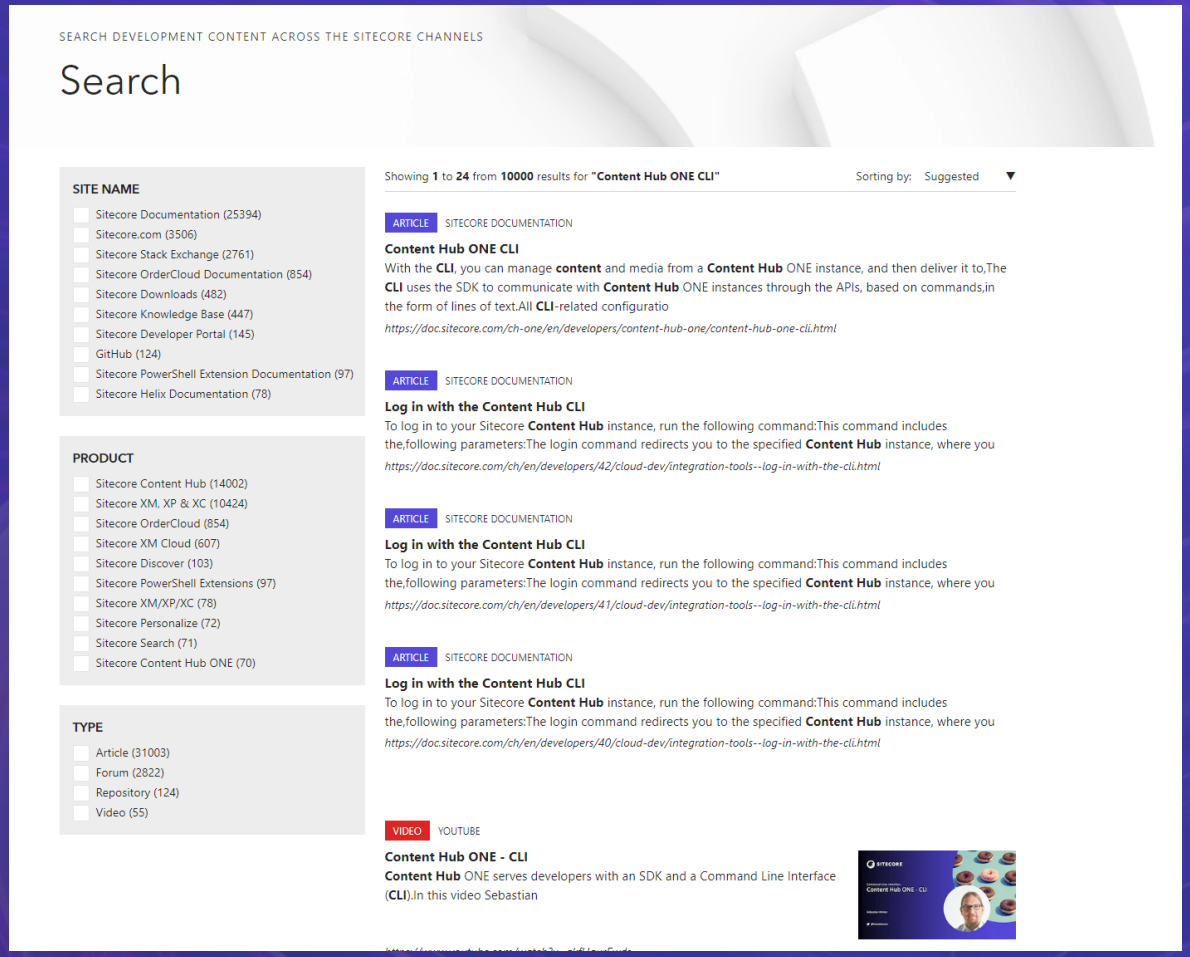
DEVELOPER RELATIONS

FEDERATED SEARCH ACROSS 10+ SOURCES



Search available now!

- Sitecore Search example implementation on the Sitecore Developer Portal
- Sources include YouTube, GitHub, multiple documentation sites, forums, and Stack Exchange
- Suggested Searches allow users to quickly jump to relevant articles

developers.sitecore.com/search

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Thank you

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