

# Sitecore Upgrade Paths & Roadmap Considerations

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# Where Should I Go?

## Sitecore Upgrade Paths

Over the last few years, Sitecore has moved toward composable architectures that embrace headless, SaaS and MACH. This has longtime customers facing uncertainty over where to go next. Consider the following strategies as you map your next steps.



## Reduce Operational Costs With a Move to Sitecore XM

Sitecore XP is a complex platform with multiple coordinated services that enable you to drive personalization, AB testing, and analytics. Even if you are not leveraging those capabilities, you are still paying for them.

With Sitecore investing in SaaS solutions that replicate and enhance that functionality, it may make sense to downgrade to Sitecore XM to retain the CMS capabilities and “in-session” personalization options like geo location, while removing the Experience Database and Sitecore Analytics capabilities that were not used. This will reduce licensing, hosting, and operational costs that could be invested elsewhere.



# Go to Managed Cloud

If your existing environments are on premises or managed in Azure and have been difficult to maintain and support, consider outsourcing to Sitecore. Sitecore provides support and maintenance services on the platform infrastructure with both standard and premium engagement models.

If you are already planning an upgrade, it makes sense to consider this option, since upgrades require standing-up new infrastructure. If you are moving to managed cloud, Sitecore will take on that effort as part of the onboarding process, allowing you to focus on upgrading the solution itself.

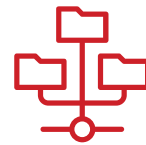


# Add Composable Features

Sitecore's composable solutions can be integrated into your existing site without requiring an upgrade. Features like CDP, Personalize, Search, Send, and Discover all integrate with JavaScript embedded at the front end. This means there will be no additional impact or effort when you upgrade the CMS, allowing you to pursue both in parallel and reduce your time to value.



**Sitecore CDP + Personalize** provide personalization across your website and other platforms, allowing you to get a single view of the customer and target them across the entire journey.



**Sitecore Content Hub** introduces DAM capabilities that ensure right-sized and cropped images are delivered every time over a CDN.



**Sitecore Send** provides a composable email marketing and forms solution.

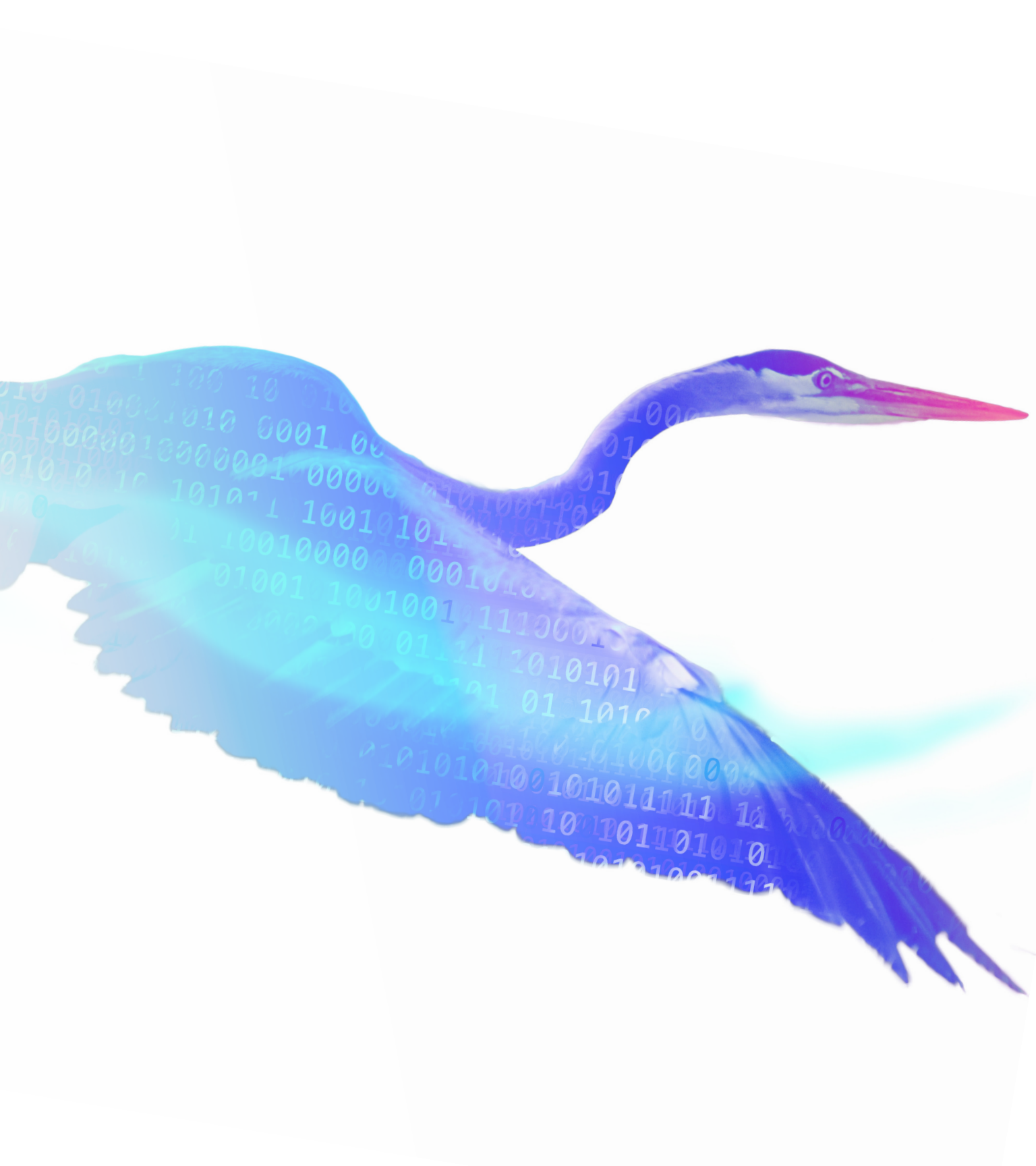


**Sitecore Search** and **Sitecore Discover** provide both content and product/merchandising search.



**Sitecore Connect** provides a low code integration platform for connecting with the rest of your marketing technology stack.





# Migrate to Headless

Headless architecture brings significant performance improvements to sites while providing flexible options for how to build your website front end. Since XM Cloud, Sitecore's SaaS CMS platform, only supports headless architectures, it is worth considering implementing new features or redesigns using a headless approach.

Note that you do not need to rebuild everything to take advantage of headless. Headless sites and features can co-exist on the same platform as traditional MVC and SXA sites.

It is recommended to upgrade to at least version 10 to gain support for Next.JS with Sitecore's new headless SXA framework.

# Rebuild for XM Cloud

If you are entertaining a full redesign or rebuild of your site, consider XM Cloud as the platform. As a purely SaaS solution, you don't have to manage infrastructure or environments, and you can leverage the fastest performance available using Experience Edge.

With Sitecore Personalize and Experience Analytics, you get features you won't get anywhere else. Plus, the platform will improve over time without the need to worry about upgrading.







## Stay on XP

If you're already leveraging Sitecore for marketing and analytics, or have requirements around data protection that rule out SaaS products, Sitecore XP is still a viable platform. You can upgrade to the latest version of Sitecore to unlock additional capabilities not supported in older versions.

Upgrades can also target stability issues, adjusting configuration and ensuring you can leverage the features you need.

Perficient can help create an enablement plan to make sure you get the most value out of the platform.



## ASSESSMENT

# Sitecore Directional Architecture IQ

This quick start uses workshops to drive directional architecture decisions including XM vs. XP, PaaS vs. containers, headless vs. SXA, search strategy, and adoption of Sitecore Personalize, CDP, Send, Search, Content Hub and more.



3 Week Turn-Around

[CONTACT US FOR DETAILS](#)



# Sitecore Directional Architecture IQ

## Scope

- Review existing platform, sites, licensing, and enabled capabilities
- Align on decision points and discussion topics for workshops
- Conduct workshops to discuss architectural options, requirements, and tradeoffs
- Document decisions, considerations, and recommendations for target Sitecore platform architecture

## Duration

- **Week 1** – Request and review existing platform and documented requirements; plan and prepare for workshops
- **Week 2** – Lead workshops to discuss architectural options and requirements to align on directional architecture decisions and factors
- **Week 3** – Synthesize, document, and present decisions, considerations, and recommendations

## Deliverables

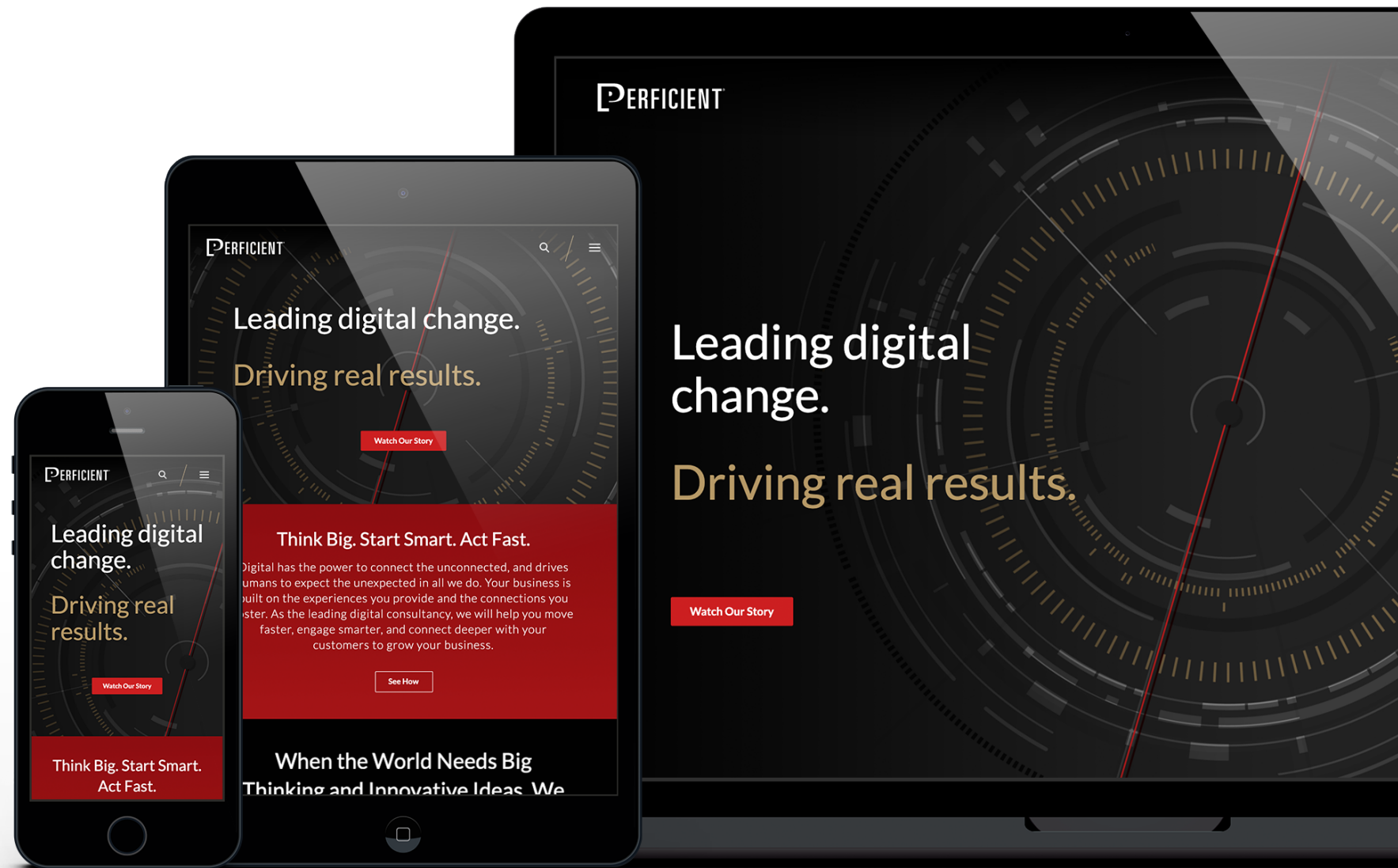
- Formal review of deliverable document with decisions, considerations, and recommendations
- Can drive requirements to scope an additional implementation phase

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