



THE ESSENTIAL GUIDE TO

**SITECORE**

**XM CLOUD**

**MIGRATION**



# Introduction

The two most important things organizations want today are flexibility and freedom. And how can that be achieved? The answer is Cloud. Marketers have always felt the need for a platform that is agile and scalable and can help them meet customer expectations. Businesses no longer want to invest their resources in clunky platforms that offer them no value.

In the wake of such demands and constant commitment towards enhancing the customer experience, Sitecore has come up with Sitecore XM Cloud—a headless CMS. This eBook explains everything you need to know about XM Cloud highlighting how you can benefit from adopting it for your business.



The worldwide end-user spending on public cloud services is expected to reach nearly **\$600 billion in 2023.**

*Gartner*

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01

# What is Sitecore Experience Manager (XM) Cloud?





# What is Sitecore Experience Manager (XM) Cloud?

Sitecore Experience Manager (XM) Cloud is a cloud-native CMS that helps brands to create, manage and deliver content at scale. XM Cloud marks the transition of Sitecore's initial CMS offering to cloud architecture and includes personalization and content authoring experience.

XM Cloud helps organizations to meet the demand of the rapidly changing market by providing visual authoring and speedy

performance. Marketers can use a simplified platform, while developers can use modern frontend tools. Sitecore XM Cloud also offers pages and components for dragging and dropping content. Besides, with the headless capabilities of Sitecore, brands can choose the deployment options and integrations most suitable to them.



# 02

## Difference between Experience Manager (XM), Experience Platform (XP), and XM Cloud



# Difference between Experience Manager (XM), Experience Platform (XP), and XM Cloud

## Sitecore Experience Manager (XM)

It is Sitecore's CMS-only offering that allows you to manage multiple websites, and multilingual content and deliver it across multiple devices and channels. It also integrates with third-party applications. Its *Experience Editor* and *Horizon* allow content authors to edit pages, components, and items. XM is part of Sitecore's PaaS portfolio on Azure Managed Cloud and can be managed on-premises with a cloud provider or a mix of both fully managed and in the cloud.

## Sitecore Experience Platform (XP)

It allows you to deliver personalized

content across channels and devices while providing you with a 360-degree view of your customer's journey. You don't need a separate marketing automation platform. You can use XP features to get data on your prospects' multiple touchpoints.

## Sitecore XM Cloud

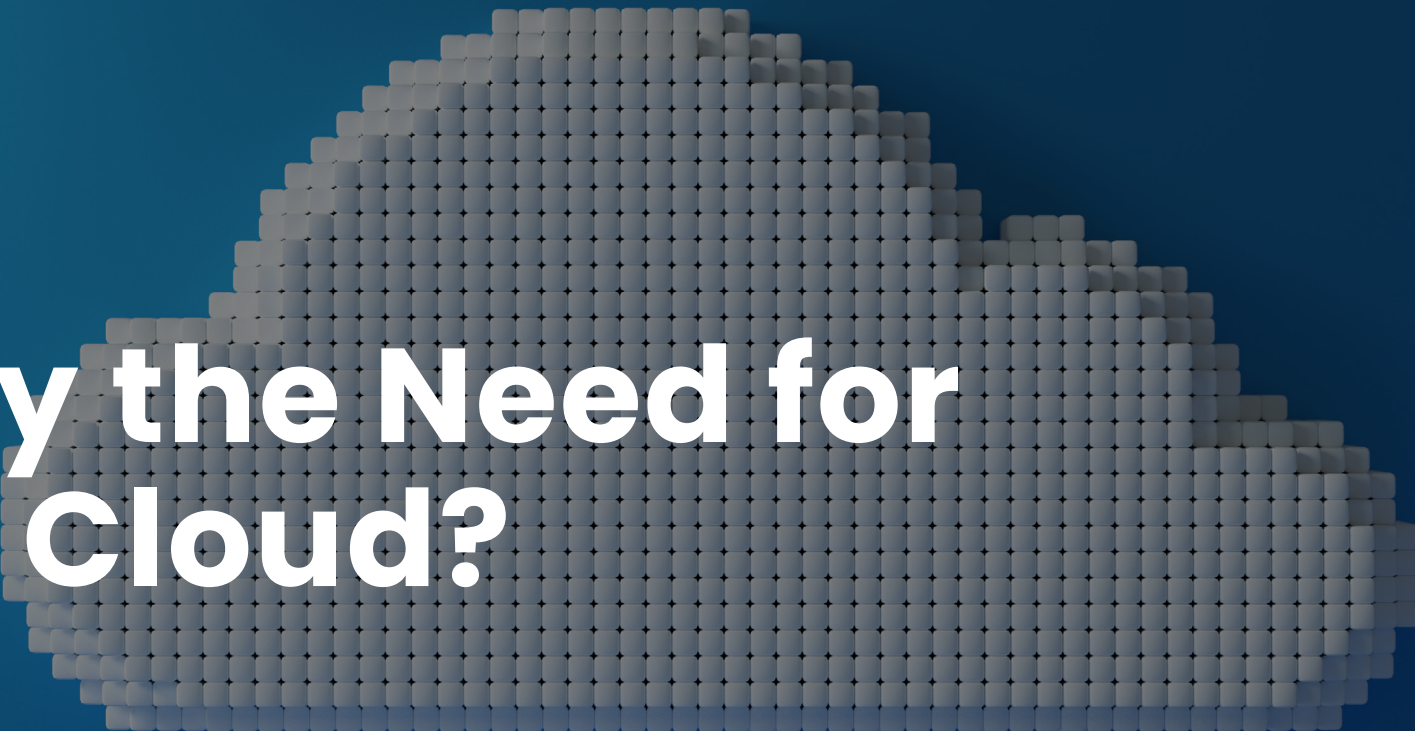
It is a cloud-native SaaS developed, designed, and deployed as a cloud-native app built with a composable architecture, centrally hosted, and licensed using a subscription model. XM Cloud is a fully headless Jamstack-ready CMS and introduces next-gen visual authoring through Pages and Components. The *Pages* includes embedded personalization and analytics.



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# 03

## Why the Need for the Cloud?





# Why the Need for the Cloud?

Brands are constantly trying to adapt to changing customer behaviors, new digital touchpoints, and the need to provide an omnichannel experience that seamlessly connects everything. For highly personalized digital experiences, companies need to be faster to market and scale just as quickly.

Moving to the cloud allows businesses to gain scalability and handle security, variable site traffic, and multi-brand architectures. Along with personalization, the cloud focuses on composability and MACH architecture. Adopting a composable approach gives you the freedom to choose the best-of-breed tools.



# 70%

of US customers want deeper, more personal connections with brands.

*Sitecore's Brand Authenticity Report  
for North America*

## Why the Need for the Cloud?

### PaaS Vs SaaS



#### Platform-as-a-service (PaaS)

Primarily useful for developers and programmers, PaaS allows the user to develop, run, and manage their apps without having to build and maintain the infrastructure or platform usually associated with the process. In the all-in-one Sitecore Experience Platform, you have Experience Platform (XP), Experience Manager (XM), and Managed Cloud.



#### Software-as-a-service (SaaS)

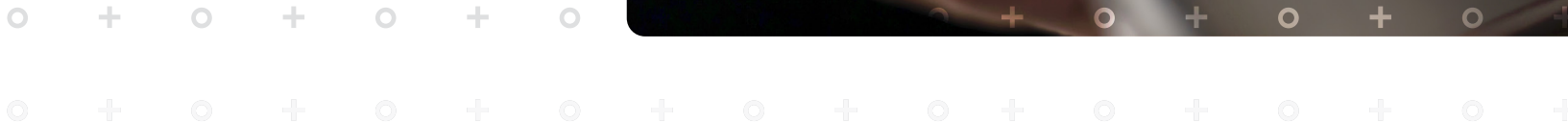
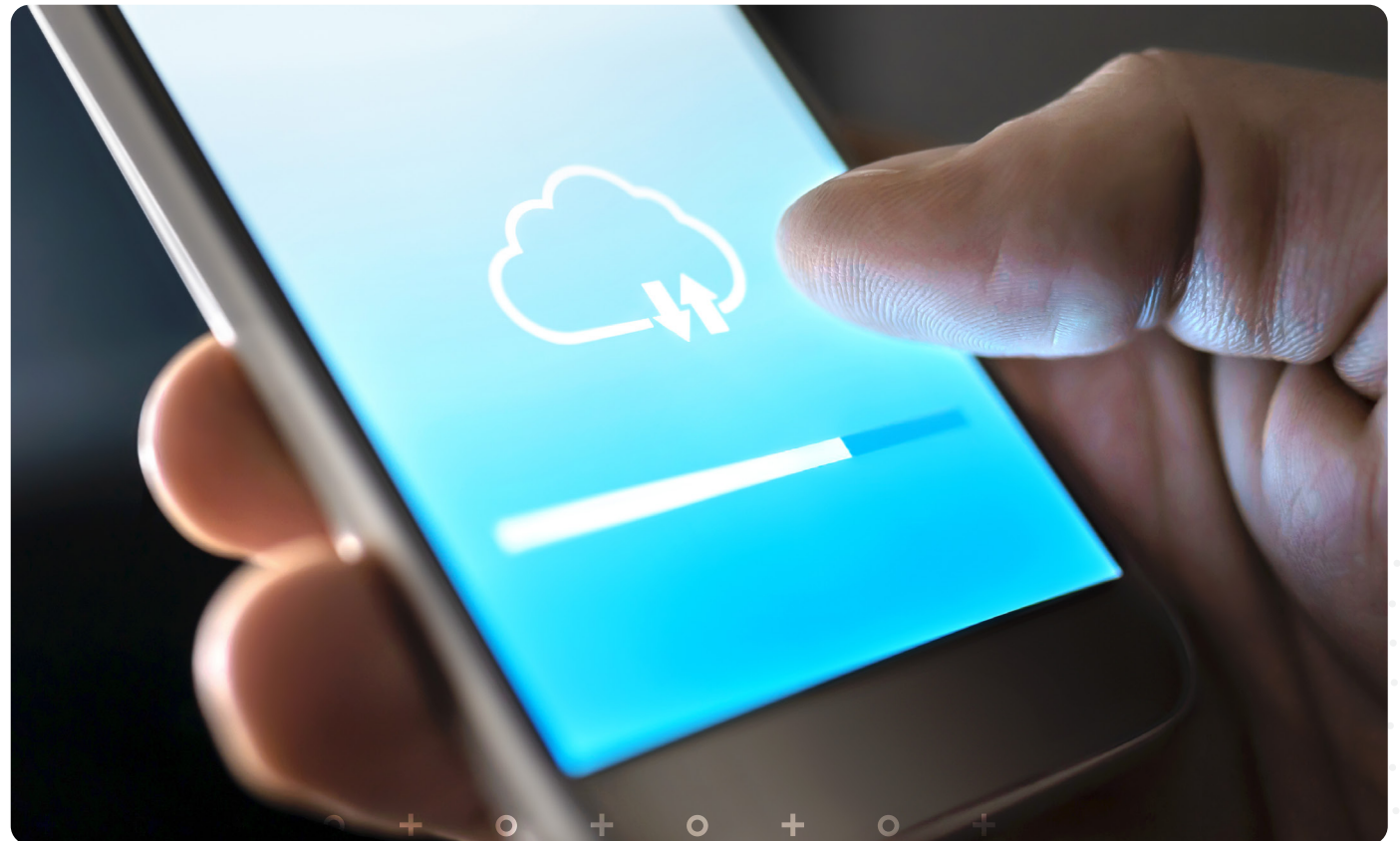
Also known as cloud application service, SaaS delivers an entire application that is managed by a provider, via a web browser. Be it bug fixes, software maintenance, or updates, everything is handled by the provider. As a user, you only need an Internet connection to connect to the app and use it anytime, anywhere.



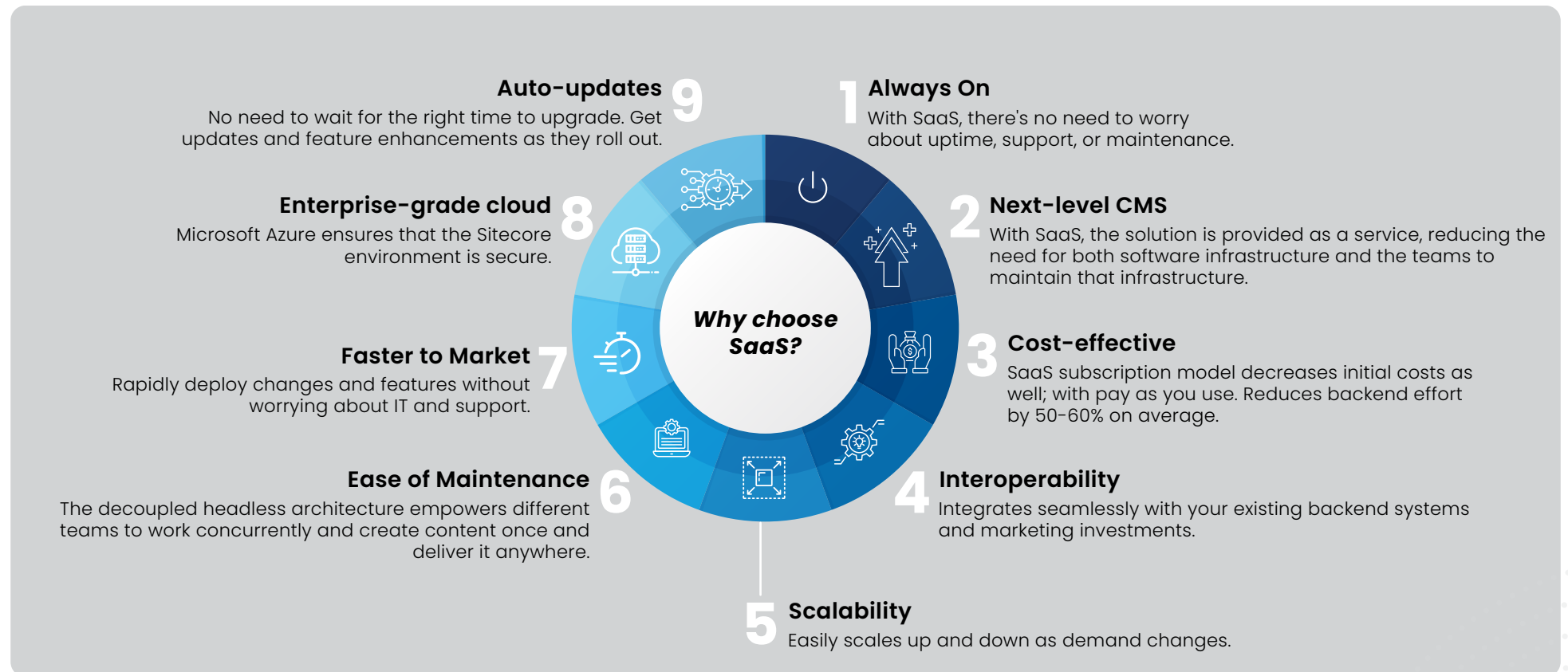
## Why the Need for the Cloud?

### Cloud-native SaaS Vs Cloud-hosted SaaS

To understand whether a technology has the scalability you need, it's crucial to know the difference between cloud-native and cloud-hosted. The terms 'cloud-native' and 'cloud-hosted' indicate a distinction between genuine current SaaS services and architectures that pass for SaaS. Skilled cloud-native software vendors use on-demand services, resource pooling, elasticity, and many other technologies. Customers don't have to worry about managing their complicated software systems and can focus on their business.



## Why the Need for the Cloud?



*The Benefits of moving to SaaS*



# 04

## How Sitecore XM Cloud Benefits You



# How Sitecore XM Cloud Benefits You

## 01 Swift Innovation & Updates

You don't need to worry about updating your software manually since the SaaS-based capabilities of XM Cloud will deliver new features and updates automatically.

## 03 Composability

With Sitecore, you can purchase solutions independently and build the best-of-breed MarTech stack that features the right tools for your business.

## 02 Elastic Scaling

No more getting bogged down because of traffic demands. With elastic scaling, you can forget about dealing with an influx of customers and traffic in the peak season.

## 04 Adaptable Engagement

Brands need to adapt to the constantly changing customer expectations and market. Sitecore XM Cloud makes it easier for you to adapt to such changes and launch campaigns and go to market more swiftly.



## How Sitecore XM Cloud Benefits You

### 05 **Multichannel Content Management**

With XM Cloud, you don't have to think twice about multichannel content. It reuses the same content for multiple platforms and channels saving you time and resources.

### 06 **Greater Simplicity for Marketers & Increased Agility for Developers**

While marketers benefit from content authoring workflows, intuitive interfaces, developers can use the frameworks and technologies that they're most comfortable with without restrictions.

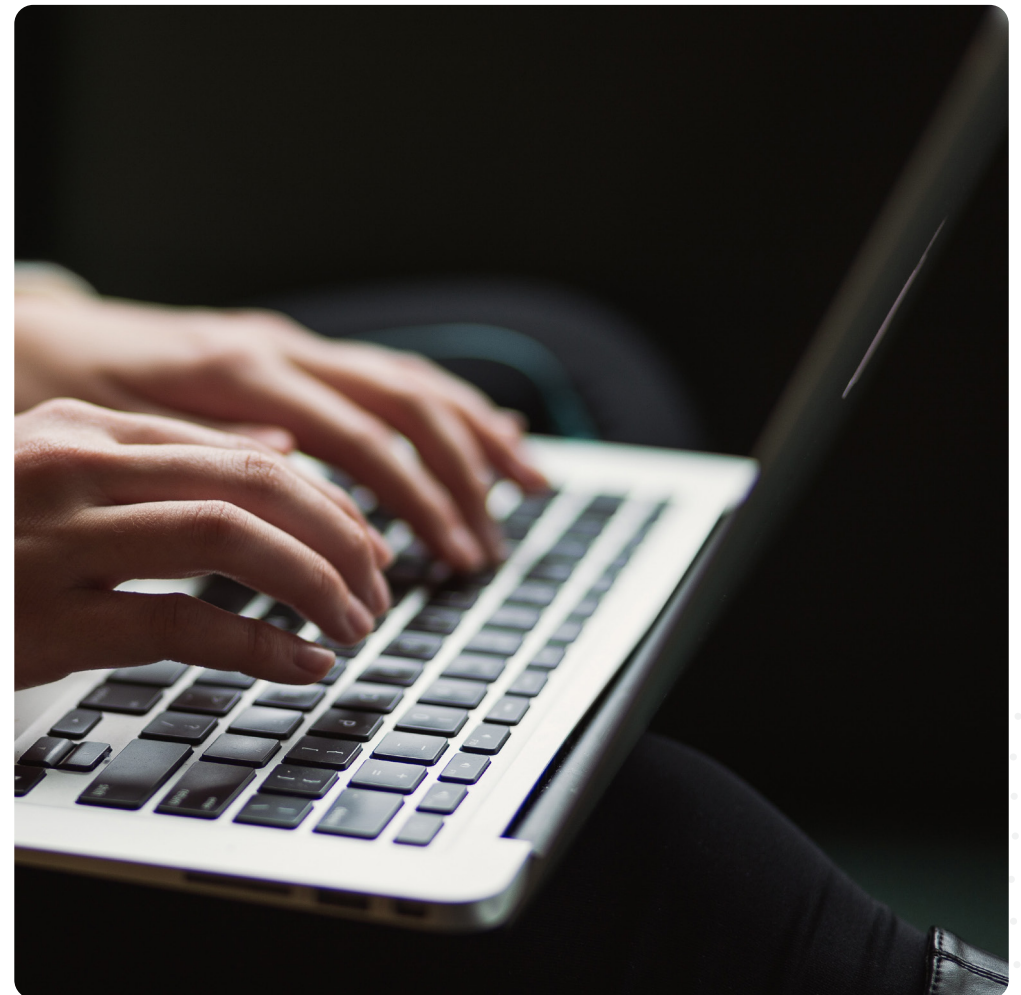


Photo by Kaitlyn Baker on Unsplash

## How Sitecore XM Cloud Benefits You

# 07 Latest Features of Sitecore Experience Manager Cloud

### Sitecore Pages

Visual editing allows marketers to build unique experiences across web pages. Static and dynamic content, templates, and media assets can all be easily accessed from one single location.

### Multisite Management

This feature makes it easy for businesses to deploy Sitecore Pages in multiple regions. It translates content into various languages creating a personalized experience for each customer.

### Sitecore Component Builder

This front end as a service solution with WYSIWYG makes content

authoring and restructured layouts easy. It delivers content to multiple channels with reusable components.

### DevOps Tools

This feature simplifies the tasks for developers by using starter kits and integrated deployment. Save time with automation, code scaffolding, and reference implementation.

### Cloud Portal

Toggle between different Sitecore products easily with a single access point for launching solutions.



Photo by Sigmund on Unsplash



05

# What is included in XM Cloud?

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## What is included in XM Cloud?

### 01 Sitecore Cloud Portal

A centralized portal that allows you to view Sitecore applications and subscriptions opted for by your organization and switch between them. If you are a member of multiple organizations, then you can also change between them. The portal is used to set up teams, roles, and users. You can see which XM Cloud instances are active using the Sitecore Cloud portal while working on XM Cloud development.



### 02 Sitecore Pages

Pages is the next stage for Horizon and the eventual replacement for *Experience Editor*. It focuses on creating and composing pages and adding components to pages. *Pages* allows users to drag and drop, build content and experiences—and all work natively with headless capabilities. Also, the embedded personalization features are layered into the Pages experience. Any custom components that development teams build can be seen in the Pages experience.



## What is included in XM Cloud?

### 03

#### Sitecore Sites

The Sites tab is for multi-site management, where you can manage and create sites based on templates that you provide to customers to get them started quickly. It's basically an SXA site scaffolding feature where you generate a default site based on a set of predefined configurations.



### 04

#### Sitecore Explorer

A new Sitecore Explorer feature that allows customers to quickly see all the different sites that they have on a CM instance. From that site, they get to see the hierarchy and structure of their pages. They can drill into the pages application or do some high-level administration on a site or a page level.





## What is included in XM Cloud?

### 05 Sitecore Components

Sitecore Components allows customers to design style sheets and theming. It also allows them to define custom HTML-based components and plug data sources into those components. This enables them to have XM as the data source where it populates items into these components. It could even be a third-party (non-secure data source) as well. These components, once defined and created, are available in the Pages experience. When a user is in the Pages for page assembly and composition, they can either choose from an SXA component that their development team built or the Sitecore Components builder that marketing teams define.



### 06 Embedded Personalization and Analytics

It is a page-based personalization wherein you have audiences and segments with a set of rules defined on those variations and audiences using Edge functions. You swap out the page that gets delivered to the visitor based on those personalization rules and preview in the Pages preview mode. And to power those rules, you have embedded analytics.



# 06

# What You Must Know About XM Cloud



# What You Must Know About XM Cloud

## 01

### Jamstack-ready

Jamstack is a modern web development architecture based on JavaScript, APIs, and Markup (JAM). Jamstack is an architecture for creating apps and websites rather than a particular technology or framework. A Jamstack site splits up the code (JavaScript), the site infrastructure (APIs), and the content (Markup) rather than using a conventional CMS or site builder.

All these are handled in a decoupled architecture with a distinct server-client separation. Shifting as much of the load as possible from the server to the client is the core motivation behind creating Jamstack websites and applications. This significantly reduces the number of requests made to a server.



## What You Must Know About XM Cloud

# 02

### The Right Approach for New Sitecore Implementations (Headless, MVC, SXA) to Upgrade to XM Cloud

Sitecore advises that new customer implementations use the most recent, publicly accessible version of Sitecore Experience Manager that has SXA installed (including headless tenants) and uses Experience Edge and Next.js for the delivery. The Edge Preview Schema on the delivery server can be used if there is no Experience Edge. Sitecore also recommends:

- ▶ Using the Sitecore CLI and/or Sitecore for Visual Studio for item serialization

- ▶ Avoiding dependencies on any tooling beyond MS Build for your Visual Studio solution (e.g., Gulp or Cake, or PowerShell)
- ▶ Limiting customization to the Content Manager role
- ▶ Using out-of-process API-based integration
- ▶ Using Docker for local development



Photo by Christin Hume on Unsplash



## What You Must Know About XM Cloud

# 03

### Forms with XM Cloud

Web forms is an MVC-based approach with dependencies upon content delivery servers. Therefore, it can't be used with headless implementations.

- ▶ In the near term, customers can utilize a third-party service, for any number of third-party API based/ API-driven forms experiences that are designed and built for headless implementations. Customers who already have Salesforce in place could also embed their Salesforce forms directly within their UIs.
- ▶ The second part is a project to deliver a headless full SaaS forms experience. The plan is to have JavaScript and HTML that you can inject into your frontend, and store that data in backend managed through the Sitecore SaaS platform.



Photo by Joseph Frank on Unsplash

## What You Must Know About XM Cloud

# 04

### Developer Experience with XM Cloud

With XM Cloud, Sitecore developers can continue to work the way they are used to, creating the Content Management solution in their local environment. Developers can utilize the Sitecore CLI to run a local Docker environment that mirrors the infrastructure and build deployment procedures used by XM Cloud. The developer's project files will be added on top of the base Experience Manager Docker image that the CLI has downloaded from the Sitecore container repository.

An automated system supplies the entire Sitecore installation in a matter of minutes. When developers are prepared to

upload their implementation to the cloud, they utilize the CLI to build new XM Cloud instances, which overlay an instance of Experience Manager with the files from their Git repository.

Developers can automatically create fresh builds whenever there are updates to the popular Git providers, starting with GitHub in the initial release, using the integrations that are available with those services. As an alternative, developers will be able to use the Sitecore CLI to initiate the creation and deployment of new environments from a codebase in their individual CI/CD pipelines.



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## What You Must Know About XM Cloud

# 05

### Move Your Current MVC-based Experience Manager Solution into XM Cloud

With the Sitecore JavaScript Rendering SDK (JSS), publishing to the Sitecore Experience Edge, and using a Jamstack framework or .NET Core client application, Experience Manager may be used as a headless CMS on the Sitecore XM Cloud. Current MVC solutions will need to be converted to a JSS version where the web solution gets content and layout data from Experience Edge to run in Sitecore XM Cloud.

This is because Sitecore XM Cloud will not support Content Delivery (CD) servers. Customers also have the option of hosting their MVC-based solutions in the Sitecore Managed Cloud, which will enable MVC-based solutions in the future. You must make sure that you are not using XM features that are not available with XM in addition to implementing XM as a headless CMS.



Photo by Arif Riyanto on Unsplash



## What You Must Know About XM Cloud

# 06

### Requirements to Upgrade the Current MVC Solution to Run it in the XM Cloud Environment

Customers with existing MVC solutions who want to move to XM Cloud will first need to refactor and rebuild their current MVC solution as a Jamstack framework or a .NET Core solution. XM Cloud will only support headless Experience Manager implementations using the Sitecore JavaScript Rendering SDK (JSS), Sitecore Experience Edge, and a Jamstack framework or .NET Core client application. The process of refactoring applies to the MVC solution's backend:

- ▶ With JSS, customers will be able to reuse their Sitecore data source, setting, and folder templates from their existing MVC solution.

- ▶ To use JSS layouts and renderings, page templates need to be modified and to be inherited from the JSS route template.
- ▶ MVC View and Controller renderings and any object-relational mapping (ORM) should be removed as they do not apply to JSS.
- ▶ MVC renderings will need to be converted to JSS renderings.

The frontend solution must be rebuilt with the backend's refactoring, preferably using a Jamstack framework like Next.js. Because of its flexibility and support for server-side rendering

(SSR), incremental static regeneration, and static site generation (SSG), Sitecore advises using Next.js (ISR).

Customers can use .NET Core, React, Angular, or Vue.js client solutions as well, but they will need to set up their own rendering host instance because XM Cloud does not offer rendering hosts. Since Next.js incorporates the rendering host capabilities as part of its run-time, a separate rendering host is not necessary. Content and layout is pushed to Experience Edge for consumption by the public after the backend refactoring and the frontend rebuild are complete.

## What You Must Know About XM Cloud

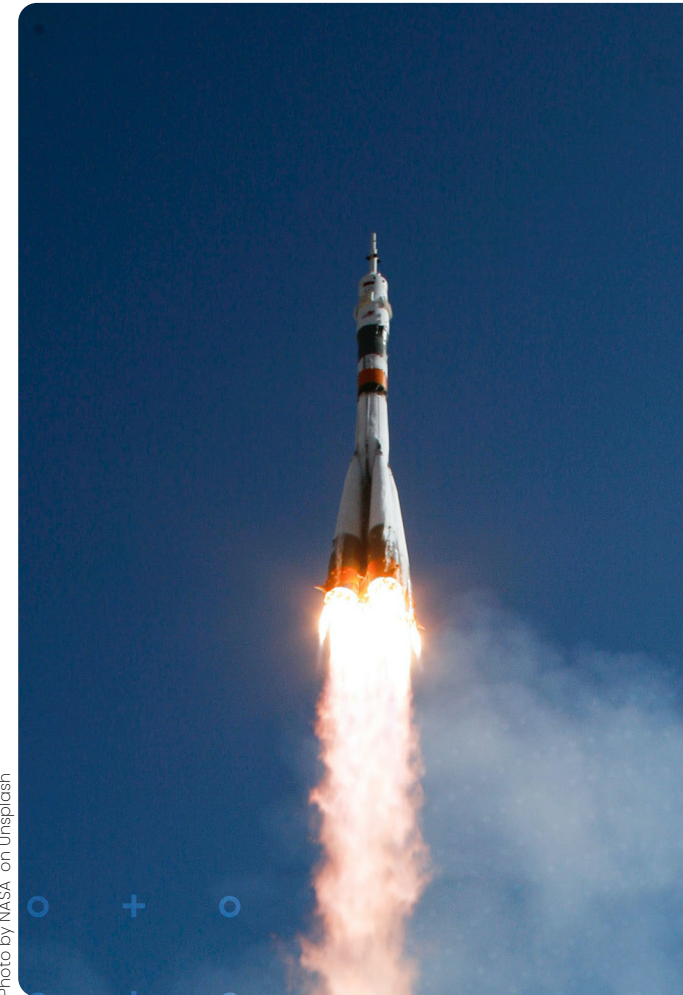
# 07

### Move Content from XP to XM Cloud

Sitecore content serialization has some tooling around it, and you can use Sitecore CLI to take existing serialized content and move it directly into XM Cloud. That serialization is compatible with Unicorn, so if it has things that are formatted in the right way then it is easily portable to XM Cloud. Additionally, there is *Razl* (which we have tested), a content migration tool that is built on serialization and works with XM Cloud.

A customer could use a more visual way of picking and choosing which content gets moved, by installing *Razl* which does require a small license. A customer can install *Razl*, connect to their existing XM instance, and then connect it to their XM Cloud instance. This way, you have a source and a destination and move content using that tool.

Photo by NASA on Unsplash



# 07

## Looking to Build Your Next DXP?





# Looking to Build Your Next DXP?

The benefits of cloud infrastructure include enhanced scalability, automatic updates, and quicker time to market. Additionally, it offers the best framework for developing a digital experience platform (DXP) that enables your organization to give customers engaging experiences. The ideal resources for building a DXP are Sitecore and Sitecore XM Cloud.

With the help of Altudo, an enterprise digital agency, and

experienced Sitecore partner, implementing a Sitecore solution and staying up to date with the latest innovations is simple. **We can help you** get the most out of Sitecore's suite of products and take advantage of every content management and personalization feature it offers. By migrating to Sitecore, you too could take advantage of cloud infrastructure, a better content authoring experience, enhanced security, and headless capabilities.





## About Altudo

Altudo is a global digital business transformation firm, focused on helping clients deliver an exceptional customer experience (CX) through 1:1 personalization & enhanced engagement. We enable this by creating an integrated IT infrastructure across an array of digital platforms in Martech, CMS, commerce, analytics, and other digital solutions, to build a single view of the customer across channels.

We have been trusted by 45+ Fortune 500 brands, and have received 10+ awards in recognition of our work. Our key partners include Sitecore, Salesforce, Zendesk, Acquia, Drupal, Contentful, BigCommerce, Shopify, Magento, SimilarWeb, and Asana.

For more information, visit [www.altudo.co](http://www.altudo.co). You can also get in touch with us at [sales@altudo.co](mailto:sales@altudo.co) or [marketing@altudo.co](mailto:marketing@altudo.co).

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