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Making the Move.

Migration Without the Mayhem.

A Practical Guide for a Seamless Transition
from Sitecore to Optimizely.

Introduction.

Migrating away from a Digital Experience Platform (DXP) like Sitecore Experience Platform is a major strategic decision - one that often comes with hesitation. IT and Marketing leaders rightly worry about the complexity involved: potential downtime, risk of data loss, spiralling costs, the sense of unknown around what you're moving to, and of course the business disruption that can come with a poorly managed migration.

Yet for many organisations, the pain of staying on a legacy platform - due to licensing costs, architectural rigidity, steep learning curves, and slower innovation cycles - has become greater than the fear of leaving.

The good news? In our experience, migration doesn't have to be painful. With proper planning, governance, and the right delivery partner, you can make a structured, low-risk transition to a more agile platform like Optimizely.

This whitepaper outlines what can go wrong, why it happens, and how to strategically de-risk your migration project.

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Why Migrate from Sitecore?

Here are some of the common reasons IT and Marketing teams are considering a move:

- **Monolithic Architecture:** Sitecore's legacy architectures makes it difficult to adopt a composable approach. This can stifle innovation and make integrations cumbersome.

- **Licensing & Infrastructure Costs:** Sitecore's licensing and cloud model is more expensive, which can lead some down a route where they go on-prem and then need multiple environments (Content Management, Content Delivery, xDB, etc.) often resulting in higher total cost of ownership (TCO).

- **Developer Dependency:** Some aspects that marketers might expect editors to perform in a modern DXP, such as aspects of personalization, can require developer involvement, limiting marketing agility.

- **Upgrade Headaches:** Major version upgrades (especially moving to their flagship Sitecore XM Cloud) can be complex and costly to implement, with limited capability benefits unless fully embracing headless delivery.

Why Optimizely?

Optimizely – positioned as a leader in both the Forrester Wave for CMS and Gartner Magic Quadrant for DXP, the latter for the sixth consecutive year – is often chosen as the alternative because it offers:

- A composable architecture that supports faster development and more flexible content delivery.

- Compelling editor experience for rapid onboarding and efficient content delivery.

- Native AI and experimentation tools, that can be brought into the platform to empower marketers.

- A cloud-native approach with fewer moving parts, reducing infrastructure overhead.

However, while the destination may be appealing, the journey itself needs to be well managed.

What Can Go Wrong. And How to Avoid It.

Migrating a DXP should never be viewed as a simple 'lift-and-shift' project. In the following pages you'll find a breakdown of the most common risks, why they occur, and how to mitigate them.

Downtime That Impacts Business Operations.

1

Why it happens:

Rushed go-live dates, poor environment planning, or gaps in deployment readiness often lead to service interruptions - especially when integrations like CRM, search, or DAM fail during cutover.

Mitigation strategies:

- **Parallel environments:** Run Sitecore and Optimizely side by side to allow phased content migration and thorough testing before switching live traffic.

- **Staged rollouts:** Use feature toggles or DNS switching to release parts of the new experience gradually.

- **Disaster recovery plans:** Always have a rollback plan in place for critical failures.

- **Analytics & Marketing Tags:** These can be a major migration headache. Audit your current tagging setup, prioritise what's essential for go-live, and drop what's no longer needed. Avoid simply lifting and shifting.

Many clients avoid migrations during peak periods - storm seasons, key sales windows, major events - due to operational risk. But even outside those times, internal resources can be unexpectedly stretched, delaying progress. Map internal resource dependencies early. Anticipate likely pressure points throughout the year and plan around them to keep your migration on track.

Data Loss or Content Inconsistency

2

Why it happens:

Inadequate content modelling, manual copy-paste migration, or missing media assets can lead to incomplete or corrupted data transfer. Sitecore's structured content and personalisation data - like engagement values, profiles, goals, and campaigns - often don't map neatly to the new platform.

Mitigation strategies:

- **Comprehensive content audit:** Identify what's critical, what's outdated, and what can be left behind. Don't migrate junk.

- **Automated migration tools:** Scripted migration reduces human error. Tools can be built to map Sitecore fields to Optimizely types.

- **Pre- and post-migration testing:** Check content accuracy, asset integrity, and functionality across devices and browsers.

- **Backup plans:** Fully back up and version-control the Sitecore content database throughout the migration.

Manual migration planning can make or break the project. Set up clear reporting and communication structures to handle the pace and collaboration needed. Too often, mismatched spreadsheet versions and poor tooling creates rework and errors. A well-documented migration plan with visible, real-time progress helps keep stakeholders informed - without derailing delivery.

Integration Breakage.

3

Why it happens:

Sitecore implementations are often tightly coupled with other systems - CRM, analytics, marketing automation, ecommerce, search engines and so on. Rebuilding these integrations in Optimizely (especially if moving to a composable setup) takes time and planning.

Mitigation strategies:

- **Integration inventory:** Document every system Sitecore connects to. Understand the data flows and business rules involved.

- **Refactor or rebuild:** Use this opportunity to evaluate if integrations should be decoupled or modernised (e.g., via APIs or middleware).

- **Sandbox testing:** Recreate integrations in a staging environment and simulate real-world usage before go-live.

We often see highly bespoke integrations and capabilities, including those based on legacy technologies. Recognising these early and developing plans to manage risk is key. What might seem relatively simple to 're-use' outside of the context of the Sitecore site can reveal dependencies.

It's essential to have a partner who has dealt with migrations of Sitecore integrations before and can help guide to you to pragmatic and resilient outcomes. This activity is often worthwhile to shed accumulated technical debt.

Cost Overruns and Timeline Slippage.

4

Why it happens:

Underestimating complexity, unclear scope, or shifting requirements can quickly inflate costs. Over time, digital platforms accumulate bespoke functionality, which can trigger unexpected edge cases during migration if not handled properly. A "lift and shift" approach often signals shortcuts in planning and detail.

Mitigation strategies:

- **Discovery phase:** Run workshops with content editors, marketers, IT, and compliance teams to uncover edge cases early.

- **Phased delivery:** Avoid "big bang" launches. Deliver business-critical features first, then iterate.

- **Fixed milestone budgets:** Use milestone-based models to control costs while allowing flexibility.

- **Detailed requirements:** Even like-for-like replatforms with the same design need proper requirements and design system alignment.

MVP may sound like a step back, but focusing on what's critical for day-one operations prevents wasted effort on features that won't survive the transition. Editors often rethink priorities when they see what Optimizely can do - especially around personalisation and experimentation. Alongside MVP planning, reassess old business processes to embrace modern workflows, such as those in the Content Marketing Platform, and explore how AI tools can streamline and enhance content operations.

Internal Team Frustration or Change Resistance.

5

Why it happens:

Marketing and content teams may be attached to Sitecore's familiar workflows or unsure about new tools. A platform change can feel like a loss of control if not handled carefully. Internal stakeholders vary - some embrace change, others prefer the comfort of what they know, even if it's flawed.

Mitigation strategies:

- **Hands-on training & sandbox access:** Give teams early access to Optimizely to build confidence.

- **Change champions:** Empower internal advocates to support adoption across departments.

- **Content governance:** Define clear editorial workflows, roles, and responsibilities to prevent post-migration confusion.

Success isn't just about migrating tech and content - it's about driving the right change in the business. That starts when editors experience Optimizely's simplicity compared to clunky legacy systems. But it also requires targeted support to help teams understand their specific setup - how to manage custom components, how the DAM integrates, or how to use content orchestration and campaign planning features.

When teams get hands-on and see how things actually work for them, onboarding becomes smoother, faster, and far less painful.

Step-by-Step Guide to a Smooth Migration.

A successful migration is less about technology and more about planning, process, and communication. This process is undertaken in collaboration with your digital partner. Here are some elements to include when approaching it.

1   Migration Readiness & Audit

Review Sitecore setup - architecture, integrations, licensing. Identify pain points and define success.

Audit templates, content types, media, forms, and personalisation.

Decide what to migrate, archive, or rewrite.

2   Content Mapping & Strategy

Map content structures from Sitecore to Optimizely.

Align with goals like flexibility, speed, or marketing autonomy.

3

Technical Architecture Design

Design the future-state architecture including CMS, DAM, analytics, and search.

Choose headless, hybrid, or traditional CMS based on business needs.

4

Solution Design & Detailed Requirements

Create a design system for components and templates.

Document detailed functional and technical requirements to guide development.

5

Development & Testing

Build components, templates, and integrations.

Test thoroughly across all features and code.

6

Configuration & Migration Execution

Automate structured content transfer.

Rebuild pages, apply new IA, configure permissions and workflows.

Recreate personalisation rules. Mix manual and scripted migration.

7

Testing, Validation & Cutover

Test content, SEO, forms, performance, and accessibility.

Run UAT with real users.

Plan go-live to avoid peak periods, using DNS/load balancers. Monitor traffic and stability.

8

Post-Launch Optimisation

Use A/B testing to refine UX.

Analyse performance and feedback.

Establish a cycle of ongoing improvements.

Final Thoughts.

A Sitecore-to-Optimizely migration is rarely a purely technical project - it's a chance to reassess how your business delivers digital experiences. With the right migration partner, a structured approach, and buy-in across departments, you can reduce risk, avoid disruption, and come out stronger with a platform that's better suited to your future needs.

Try to avoid the trap of 'lift and shift'. A burning platform can often create pressure to focus on the technology aspects of the migration with a view to delivering on the digital strategy later. In principle, there's nothing wrong with approaching the migration with this sense of agility, but it should not diminish the need to ensure a solid foundation of requirements and design to inform a successful build.

The key is not just moving fast - but moving smart.

Andy Pimlett – Product Director

With over 20 years of experience in website design and development, Andy is involved in all stages of project delivery - from discovery through design and build - ensuring our team delivers accessible, high-performing, responsive, and compelling digital experiences. Andy plays a key role in shaping our product-oriented engagement approach, with responsibility for applying best practices in product ownership and agile delivery.

Next Steps.

Contact us today to determine your organisation's migration feasibility.

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