

# The No-nonsense Guide to Sitecore DXP Upgrades

Make slow upgrades a thing of the past

# Let's get started

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## Why Upgrading Matters

Technology is always on the move, staying ahead isn't just about keeping up - it's about seizing new opportunities to lead and innovate.

Keeping your Sitecore platform up-to-date is essential for security, performance, and delivering exceptional customer experiences. It ensures your business benefits from the latest features and performance enhancements. It provides compliance with Sitecore's support windows and in many cases your industry regulations.

However, many organizations struggle when it comes to upgrades because they come with lengthy timelines, unexpected costs, and operational disruptions. The good news? There's another way one that might not have been on your radar before.

This guide is designed for CTOs, IT teams, and DevOps leaders who need to navigate Sitecore upgrades from both a business and technical perspective. We'll walk you through the key questions for an upgrade process, from understanding when and why to upgrade to key decisions that you will need to make, we'll highlight why leveraging proven processes and solutions will provide you a seamless experience.

“

Dataweavers removed the burden of infrastructure maintenance, letting us focus on what we do best.

”

Senior Software Development Manager, London & Partners

## When do I need to do a Sitecore upgrade and how long does it take?

Upgrading isn't just about keeping the lights on, it's about keeping your platform secure, scalable, and future-ready.

Sitecore's Product Support Lifecycle determines when support ends, and running outdated versions means security gaps, compliance risks, and rising costs.

Sitecore follows a structured Product Support Lifecycle, consisting of three phases:

- Mainstream Support: Full updates and fixes for 3 years.
- Extended Support: Limited updates for an additional 3 years.
- Unsupported Phase: No security patches, leading to compliance risks.

For organizations on Sitecore 9.3 or earlier, upgrading should be a priority, as security updates and support are no longer available for earlier versions and 9.3 expires at the end of 2025. Planning now is essential.

The duration of a Sitecore upgrade depends on implementation complexity.

The table below compares average upgrade timelines using Fusion, which leverages templates and automation to significantly accelerate the process.

### Expected Upgrade Timelines

Complexity Level	Traditional Timeline	With Automation
Easy	3+ months	6 weeks
Medium	6+ months	12 weeks
Highly Complex	9+ months	14 weeks

## Beating the Big Upgrade Budget

One of the biggest concerns around Sitecore upgrades is cost. We've seen traditional upgrades consume up to \$500k and still run over. How much should you budget? What is the impact of lost productivity on your team?

### The Impact of Traditional Upgrades

The below outlines the effort from your team using a traditional approach vs working with a proven process.

Complexity Level	Traditional Timeline	Automation
Easy	960 hours	40 hours
Medium	1920 hours	72 hours
Highly Complex	2880 hours	80 hours

A proven process with built-in automation, that doesn't distract your team, is driven by tools that will completely mitigate these challenges and results in a successful upgrade delivered at a fraction of the time and cost.

### How Automation and proven Templates Reduce Costs and Complexity



**Faster timelines** - Automated, validation, and deployments cut upgrade durations from many months to weeks.



**Error-free execution** - Reduce misconfigurations and downtime with fully automated processes.



**Optimized resources** - Keep IT and development teams focused on innovation instead of upgrade maintenance.



**Cost predictability** - Minimize unexpected delays and budget overruns with fixed approaches delivering streamlined automation.



**Stable performance** - Automated infrastructure management ensures reliability and long-term efficiency.

## What important decisions do I need to make upfront?

The success of your upgrade depends on early planning. Here are six critical decisions to consider from the start:

### Decision 1: Stay on Sitecore XP or Downgrade to XM?

Many organizations adopt XP for marketing and analytics but later find these features unused due to shifting priorities.

Downgrade to XM – Reduces complexity and costs while aligning with a composable roadmap for integrating Sitecore SaaS solutions like Personalize and CDP when ready.

Optimize XP Usage – If keeping XP, clean up outdated campaigns, streamline analytics, and reconfigure settings to improve performance and simplify migration.

### Decision 2: Get Ready for Headless or Not?

A full headless transition during an upgrade can be costly, as it's effectively a rebuild. Your business may not be ready for that. If headless is ultimately on your roadmap, use the upgrade to establish the components needed to start headless, deploy the headless services and set up a rendering host. This will lay the foundation for a future transition to headless at a suitable pace.

### Decision 3: Set targets for Performance and Availability

Assess key metrics such as time to first byte, page load speed, editing wait time and availability percentage. Many improvements can be made without rewriting code by optimizing scaling, caching, and configuration, while a few critical code fixes can further enhance efficiency. Setting clear performance targets early helps guide infrastructure and application decisions during the upgrade.

### Decision 4: Content Plan

Updating content in two places is inefficient for content authors. Planning automatic content synchronization around acceptance testing ensures your upgrade won't impact business-as-usual

### Decide 5: If and when to remove dead code?

Eliminating unused code branches or features is typically a low-effort task that results in better performance and maintainability. Make a call on what to cull.

### Decision 6: Keep or Refine Release Processes

The upgrade is an opportunity to improve CI/CD pipelines for faster, more reliable deployments. Evaluate whether to retain existing processes or adopt a refined approach for increased efficiency

## The Role of Infrastructure

Your infrastructure is the backbone of your upgrade. Get it wrong, and you'll face slow load times, downtime, and ballooning costs.

Many teams focus solely on upgrading the codebase but forget that without a well-architected, scalable infrastructure, even the best upgrade can fail. A successful Sitecore upgrade starts with a solid foundation optimizing infrastructure before, during, and after the upgrade ensures long-term stability and efficiency.

Leverage Infrastructure as Code (IaC) – Automate deployments and reduce errors with predictable, repeatable infrastructure setup.



**Predictable deployments** - Less firefighting, more uptime.



**Automated scaling** - Never overpay for resources.



**Security-first approach** – Compliance and peace of mind.

Use Azure PaaS for scalability, performance, and cost efficiency – Azure PaaS removes infrastructure headaches by automating scaling, integrating with DevOps, and ensuring high performance.



**Always-on performance** - Seamless traffic handling with automated resource allocation.



**Lower operational overhead** - Built-in maintenance, updates, and security controls.



**Flexibility** - Faster releases with full DevOps integration.

Implement high-availability configurations to ensure resilience. Redundancy and automation keep your platform running smoothly.



**Multi-region redundancy** - No single point of failure.



**Load balancing** - Optimized traffic distribution to prevent bottlenecks.



**Automated failover** - Instant recovery from unexpected disruptions

## What If Your Upgrade Made Operations Easier?

Every digital leader understands that keeping Sitecore up to date is essential for security, performance and innovation. Let's be real, traditional Sitecore upgrades can be slow, painful, and full of hidden pitfalls:



**Instability & Downtime**



**Marketing Disruptions**



**Higher Costs & Security Risks**

Even if you address the major upgrade challenges, the ongoing operational overhead of managing your environment can slow you down. The key to long-term success is to introduce automation and standardized operational processes during the upgrade. It's the perfect time to

### Key Areas to Focus On:



**Patching:** Implement a structured approval process and automate patch deployment to ensure consistency and security.



**Endpoint Testing:** Introduce post-release validation automation—start with core functionality tests and expand over time.



**Monitoring:** Enable continuous monitoring with well-defined alert conditions and automated response mechanisms.



**Failovers:** Ensure failover mechanisms are integrated with monitoring, enabling seamless recovery in case of system failures.



**Scaling:** Configure automated resource scaling to dynamically adjust capacity based on demand.



**Cost Management:** Set up automated budget tracking and spend alerts to prevent unexpected cost overruns.



**Code Validation:** Integrate automated code quality checks into your development workflow to maintain stability and compliance.



**Security Alerting:** Configure threshold-based security alerts and automation runbooks for rapid response. Establish a regular review process to validate and refine security rules.

By embedding these practices when you upgrade, you will reduce the burden on ongoing operations and future-proof your platform.

# Fusion

## For Sitecore

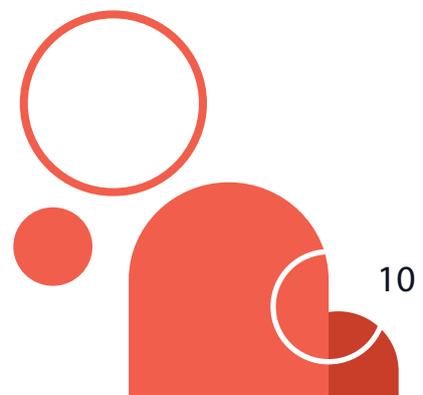
## Getting Started

Fusion for Sitecore transforms the way organizations approach upgrades, making them faster, more predictable, and hassle-free. Fusion streamlines complex upgrades, eliminating risks and reducing time to market.

One of the standout benefits of Fusion is its end-to-end automation, which accelerates deployment and minimizes manual effort. Unlike traditional upgrade methods that rely on time-consuming configurations and troubleshooting, Fusion uses pre-built templates, automated code upgrade tooling and continuous content migration to ensure a seamless transition.

The result? Zero-downtime deployments, fewer upgrade-related issues, and a future-proof Sitecore environment that's optimized for performance and scalability.

With Fusion, you don't just upgrade you evolve, ensuring your digital experience platform remains cutting-edge and always ready for what's next.



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