

The platform, the framework and the coach

”Coaching” for in-house application developments

The case of ”HEP-Bejune Portfolio”

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About this talk

- Solution Providers deliver training
- We need to go beyond classical training
- Enter the world of "Coaching"
- Case Study

The Question !

- What do our customers want ?
 - Solutions (Not Technology)
 - CMS and/or web-based apps that deliver service to employees/partners/customers.

You may replace the word "customers" by "users"

How they approach the problem ?

We see 3 ways of doing:

- A) Outsource the work
- B) Get training for the team
- C) Mix of A and B

Approach A: Outsource

Hire Plone consultants to deliver the complete solution

Approach B: Get training

Train the developers that will deliver/maintain the applications on top of Plone

Approach C: *Flexibility*

A mix of A and B generally occurs after 1 or 2 successful project(s).

Good news, all this works !

- Users (Companies) find
 - Experts that understand their problem domains, and deliver the customized solution.
 - A helpful community : 3rd-party modules, documentation, mailing lists, books.
 - Good training offering.

But there is a "but..." !

"Isolation"

We (Solution Providers) are perceived as "the only experts" that understand the technology.

Risk

The day things do not work as expected, disappointed users could simply switch to the competition.

It's important to solve this...

... because we have big plans for the "web-based applications" industry.

Plone's ambition

Be at the core of every major intranet or collaborative site... and beyond.

IMO, 3 efforts

- Simplify the technology
- Spread the technology
- Help the company's team adopt the technology

#1: Simplify the technology

- It's getting better : See Plone 3 !
 - Modular
 - "Batteries included"
 - Configuration: Sensible defaults + configlets for easy changes.

#2: Spread the technology

It's on its way : The community is alive !

#3: Help the team adopt the technology

- Help companies get their staff more involved.
 - Training
 - Documentation - Books
 - Support

Not as easy as it may seem !

Addressing #3

Use "Coaching" !

Value of coaching – for Customer

- Interaction with someone that
 - *Has a good knowledge of the platform's internals*
 - *Is a member of the community*
- He is "engagé" in the client's project.

Value of coaching – for Provider

- Better understanding of what users want...
 - More opportunities for those "AHAH" moments.
- A more exciting way to transfer knowledge.

We are doing it !

- HEP-Bejune
 - A regional education center for trainers
 - "Hautes Etudes Pedagogiques"
 - Berne – Jura - Neuchâtel
 - A project to build their new website
- Others...

The new hep-bejune site

The screenshot shows a Mozilla Firefox browser window displaying the HEP-Bejune website. The browser's address bar shows the URL <http://www.hep-bejune.ch/>. The website header features the HEP-Bejune logo and navigation links: [webmail](#), [annuaire](#), [plan de site](#), [accessibilité](#), and [contact](#). A search bar with the text "rechercher" is also present.

The main content area is titled "Haute École Pédagogique - BEJUNE" and "Berne - Jura - Neuchâtel (Suisse)". Below this, a navigation menu on the left includes links for "Accueil", "La HEP-BEJUNE", "Formations", "Guichet étudiants", "Recherche", and "Médiathèques". A "Se Connecter" section follows, with fields for "Identifiant" and "Mot de passe", and a "se connecter" button. A link for "Mot de passe oublié ?" is also visible.

The central content area features a news item dated "29 mai 2007" titled "Nouvelle publication des éditions HEP-BEJUNE" with the subtitle "L'insertion professionnelle des enseignants ! (collection 'Recherches')". Below this is a large heading "Bienvenue" followed by the text: "La Haute Ecole Pédagogique - BEJUNE (Berne partie francophone, Jura et Neuchâtel) déploie ses activités à Bienne, Porrentruy, la Chaux-de-fonds et Neuchâtel." The main body of text states: "La HEP-BEJUNE se consacre à la formation initiale et continue du personnel scolaire et plus particulièrement des enseignants ainsi qu'à la recherche sur l'enseignement et à la diffusion des connaissances dans le domaine éducatif. Institution tricantonale du degré tertiaire, elle remplit ses missions réparties en cinq domaines appelés plate-formes:"

- PF1: formation initiale du personnel enseignant de l'école infantine et de l'école primaire
- PF2: formation initiale du personnel enseignant des degrés secondaires 1 et 2
- PF3: formation continue de l'ensemble du personnel enseignant de l'espace BEJUNE
- PF4: ressources documentaires et multimedia
- PF5: recherche

At the bottom of the main content area, a note reads: "Le nouveau site de la HEP-BEJUNE a été complètement réorganisé et".

On the right side, there is an "Actualités" section with several entries: "Une histoire de Triton" (24/09/2007), "Coordonner, collaborer, coopérer" (21/09/2007), "Trajets en commun" (13/09/2007), and "Bulletin 6 de la HEP-BEJUNE" (02/07/2007). Below this is an "Agenda" section with entries for "20/08/2007" and "25/04/2008".

The browser's taskbar at the bottom shows several open windows: "Liste de contacts", "[Courrier entrant - Th...", "[Rédaction : (pas de s...", "NaplesTalks - Navigat...", "ploneconf2008-coach...", and "HEP-Bejune — HEP-B...". The system tray on the right shows the time as "jeu 27 sep, 12:36".

What the "HEP-B" team got right !

- If you know how to use the power in Plone, you can win big !
 - There are many possibilities beyond basic content management.
- Getting trained soon in the timeline of the project helps avoid many traps.

History & context

- Internet site project (Plone 2.1 + custom development...)
 - Project managed and delivered by Ingeniweb (Gilles Lenfant).
 - Training delivered for integrators, in the middle of the project.
 - *Good decision.*
- Sub-project: *HEP-Bejune Portfolio*

The coaching experience

- Developing an add-on: *HEPPortfolio*
 - A first 2-day session on-site : specify + develop a prototype
 - 2 x "2-day virtual sessions" (using Subversion + email + phone)
 - Ping/pong between the coach and the developers with code changes.
 - Answer questions / quality / bug fixes.

Who writes the code ?

- The coach and/or the "lead developer"
- *The coach reviews it, helps improve it...*

What's more important

Along the way, the coach explains the techniques/tricks used in the code.

The code in HEPBPortfolio

- Archetypes
 - Eases the learning process
 - The trick: initializeArchetypes()
- *When the Member folder is the right answer !*
- Poor man's configuration with Python

Let's see it in action !

The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Applications Raccourcis Système | Kamon AYEVA | lun 8 oct, 15:42
- Browser Tab:** HEPB Trainer — Portal
- Browser Menu:** Fichier Édition Affichage Aller à Signets Onglets Aide
- Browser Navigation:** Précédent Suivant Arrêter Recharger Accueil Historique Signets Plus petit Plus grand
- Address Bar:** http://localhost:8080/hepbportfolio/Members/hepbtrainer/portfolio/
- Page Header:** HEP BEJUNE logo, plan de site | accessibilité | contact | rechercher
- Breadcrumbs:** vous êtes ici : accueil → members → hepbtrainer → hepb trainer
- Navigation Menu (Left):**
 - Accueil
 - Members
 - hepbtrainer
 - HEPB Trainer
 - Renseignements
 - Enseignement et encadrement
 - Autres activités et productions
 - News
 - Events

- Main Content Area:**
- actions | affichage | ajout d'un élément | état : publié sur internet
- Portefolio de HEPB Trainer
- HEPB Trainer (with silhouette icon)
- Renseignements
 - Administration
 - Domaine d'expertise
 - Curriculum vitae
- Enseignement et encadrement
 - 2007 - 2008
 - 2008 - 2009
- Autres activités et productions
 - Documents
 - Liens
- Taskbar (Bottom):** Terminal, Zope on http..., import - Navig..., Liste de conta..., Default Sessi..., HEPB Trainer ..., Terminal, Tracker Intergr...

Lessons learned #1

Build a "team" (possibly virtual).

Lessons learned #2

Prepare coaching sessions up front (using a wiki or other specifications tool).

Lessons learned #3

- Generally 4/5 days.
 - Use the first day for a general introduction to the framework, APIs, and the development tools.

Lessons learned #4

Use Subversion for better collaboration on the code.

How I will do it next time

- Methodology
 - *Pair Programming, Scrum*
- R.A.D. framework
 - Grok
 - *Fits the learning process*

Credits

- *François Hurter (HEP Bejune)*
- *Pierre-Olivier Vallat (HEP Bejune)*
- *Gilles Lenfant (Ingeniweb)*

Thank You !

Questions ?