

## Lessons Learned from the PMMM Research Series<sup>1</sup>

### Maturity Evolution: A Challenging Journey<sup>2</sup>

By Darci Prado, PhD

#### ABSTRACT

This is the fourth article in the series “Lessons Learned from Maturity Research”. We now present the journey towards the evolution of maturity in project management, discussing peculiarities and challenges. We remind the reader that knowledge of the articles published in previous issues of this journal [5,6,7] is very important for a proper understanding of this text.

#### 1 – THE IMPORTANCE OF MATURITY DEVELOPMENT

As shown in the graph below (Figure 1), the importance of maturity development is clearly demonstrated by the fact that the greater the maturity level, the greater the success rate of projects execution and outcome.

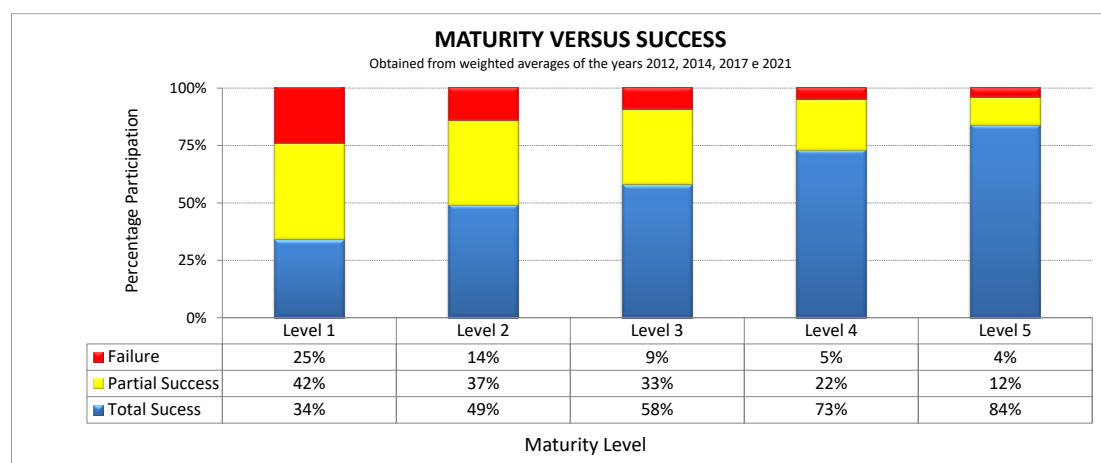


Figure 1: Relationship between Success and Maturity [1].

<sup>1</sup> The Project Management Maturity series of articles by Prof Darci Prado is based on his extensive research on this topic in Brazil and other countries. Darci is the developer of the Prado Project Management Maturity Model which has been successfully implemented by many organizations in Brazil. More about this model and related research can be found at: <https://maturityresearch.com/en/home-en/>

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The data shown in Figure 1 was obtained from data presented in a previous article [5]. The values shown in this graph represent the weighted averages for the years 2012, 2014, 2017 and 2021.

For many organizations, reaching maturity platform of excellence (levels 4 and 5) means survival and growth in the competitive business market. For them, evolution is not only desired, but necessary. Certainly, reaching this level is an important goal, but unfortunately, this is not easily achievable. Figure 2 demonstrates that in 2021, most Brazilian organizations were at lower levels of maturity. Maturity levels 1, 2 and 3 combined represented 78% of Brazilian organizations, and only 22% were at maturity levels 4 and 5.

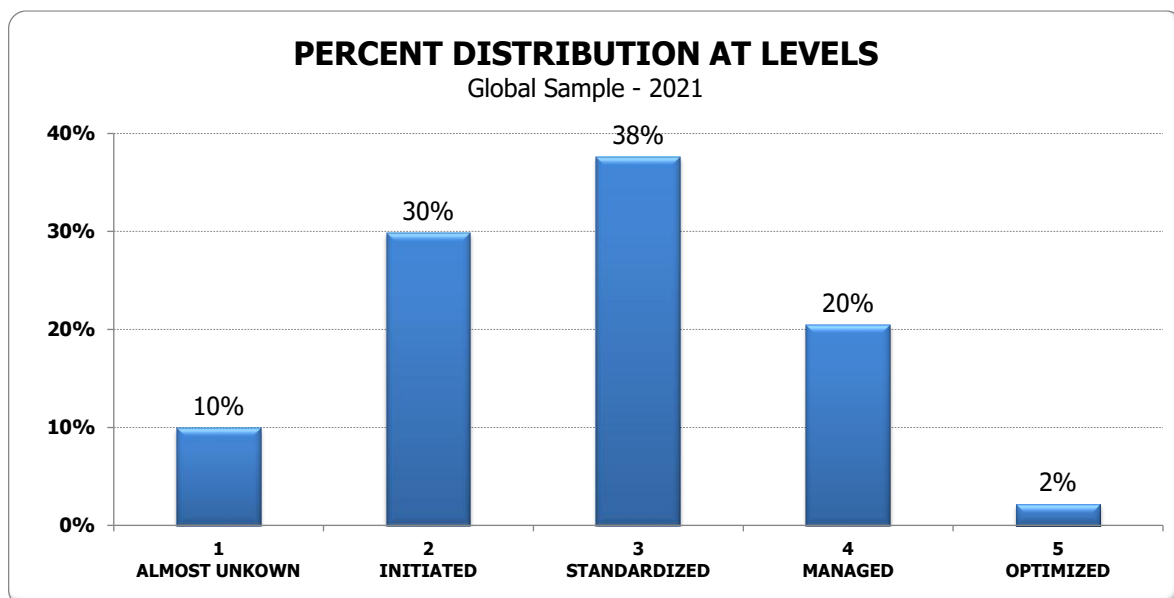


Figure 2: Maturity levels participation 2021 [1].

What would then be a strategy to reach the maturity platform of excellence? Before we address this subject, it is important to review the different components of the path of maturity development (this subject was also presented in article 1 of this series [4]).

## 2 – KNOWING THE NEEDS AND CHALLENGES OF EACH LEVEL

Each maturity level has its own characteristics, as briefly described below.

### Level 1: The concept is mostly unknown

It is the starting point for many organizations. In this level, the concept of project management is practically unknown.

## **Level 2: Initiated – individual approach (“Each one in his or her own way”)**

Progress to level 2 (“Initiated” or “individual approach”) usually occurs naturally and organically, where each project that emerges is assigned to a professional whose routine work has some relationship to the scope of the project in question. At level 2, advances in knowledge occur to meet immediate needs, and generally involve basic PM knowledge and the use of some tool (software) for sequencing activities. As the number of projects increases, so does the multiplicity of individual management approaches (“each one in his or her own way”), making it difficult to have a consolidated view of the work as a whole. This limits the role of the senior management team in making decisions that can impact on the agility and assertiveness of the project management, compromising the achievement of organizational strategies.

Furthermore, as the need for projects for the survival and growth of the organization becomes clear, the subject of “project management” becomes better known to the organization’s senior management team. All of this points to the need for evolution of the way projects are managed.

## **Level 3: Standardized – A unified platform**

From level 3 onwards, in addition to the individual project managers and their teams, we now have a coordination team who oversees several projects and monitors their planning and execution. This coordination team, almost always in the form of a PMO, is mainly responsible for the creation of a single management platform, which involves processes (methodology), tools (software), organizational structure, governance and training. The database may contain data beyond traditional PM data (schedule, costs, stakeholders, etc.), such as revenue, equipment usage, etc. The PMO is also responsible for maintaining the high administration informed.

The challenge here is to create a unified management model for all projects. This implies breaking away from working at level 2, which, despite its weaknesses, has become well consolidated. At level 2, the project managers have learned their own way of working, and this has become incorporated in the processes of the organization. The adoption of a single management model by everyone, including the teams and the leadership, therefore, represents an additional challenge. This challenge is significant, as it is a change in the organization mindset/culture.

The platform mentioned above can be developed internally or purchased on the market, as there are several software programs capable of meeting the specifications above. AI tools have proven useful for work at this level. ChatGPT has helped in the production of documents, such as the Project Plan. Analytics has helped identify chronic causes of anomalies in project execution, an important aspect for the next level.

#### Level 4: Managed – Anomaly Mitigation

Level 4 brings new challenges: ensuring that projects are successful and delivering results. This means mitigating the problems identified in level 3 that are harming project performance, which is not an easy task, especially when the problems are found in areas outside the project owner (the matrix structure).

#### Level 5: Optimized – The pursuit of perfection

The challenge of level 5 is to go beyond level 4, optimizing the way of working in terms of processes, tools and governance. AI tools have helped with this function.

### 3 – WHAT IS THE BEST STRATEGY FOR EVOLUTION?

First, a question: how long does it take to reach the platform of excellence? According to Kerzner [3] and my own experience as a consultant, it takes between 5 and 8 years to move from the initial stage (level 1) to reach the platform of excellence (level 4 or 5).

Now we have a second question: What should the journey be like?

- Would it be as shown in Figure 3, where we should aim to reach the platform of excellence in a single leap?

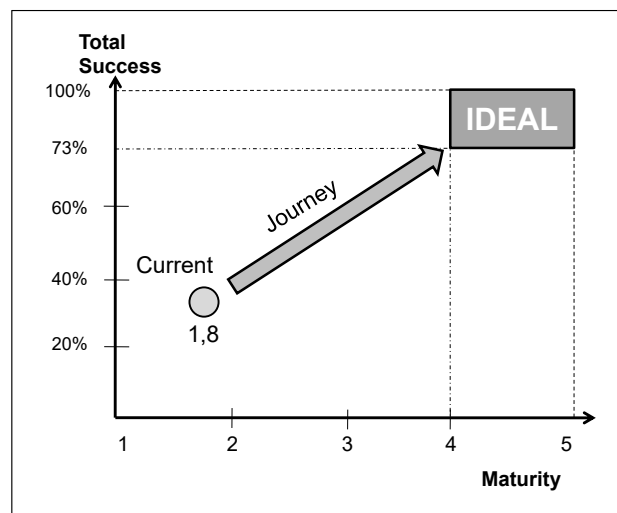


Figure 3: Evolving directly to the platform of excellence [3].

- Or should we evolve in the sequence of levels, moving forward after mastering the previous level, as shown in Figure 1? In other words, from level 1, we go to level 2, then to level 3, then to level 4 and, finally, to level 5. Would that be the case?

The experience with Falconi Consultants and the specificities of the Prado-PMMM model have shown us that neither option has been used by organizations. Directly aiming for the platform of excellence would be a huge and very long-term challenge (5 to 8 years) and, therefore, completely contrary to good project management standards, which do not recommend initiatives of such duration.

Evolving sequentially to each maturity level is not practical or even realistic according to the way the Prado-PMMM model was created. This is because a department of an organization typically exhibits, at a given time, features of different maturity levels, instead of perfectly fulfilling all the criteria of a single level. During the maturity assessment of that department, this is carefully evaluated. A broad list of weaknesses of the department is generated, encompassing all maturity levels. This list is filtered to obtain a more refined, pertinent smaller list of weaknesses, which will be used to create a list of priority actions that are needed for improvement and growth.

Returning to the question above, the best strategy has been to evolve through cycles (or large stages) as shown in Figure 4. Such cycles can last between 6 and 12 months for implementation, followed by a period of use that can last from 6 to 24 months.

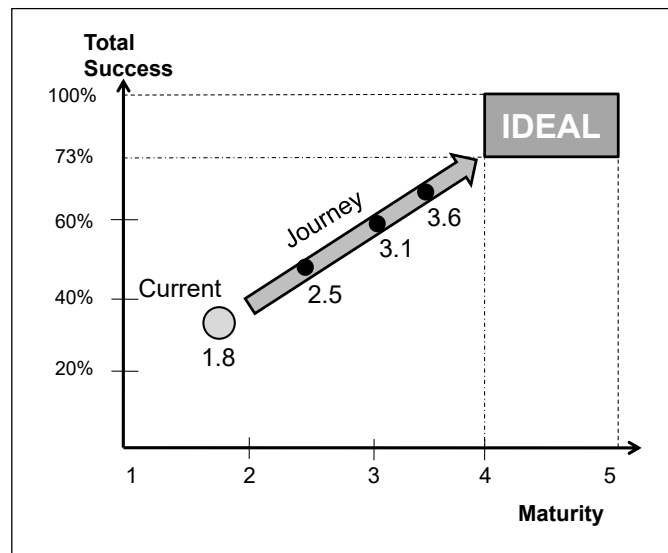


Figure 4: The right journey: evolution in cycles [3].

When choosing the tasks to be included in the next cycle of maturity evolution, the choice will naturally include tasks that correspond to different maturity levels. An evolution cycle may include simultaneous advances at different levels, but these simultaneous advances are generally not of equal power. For example, when advancing maturity from 2.5 to 3.1, we may have tasks related to levels 3 and 4, but with a greater presence of tasks to consolidate level 3.

Finally, it is important to say that before starting the evolution journey, we cannot forget a crucial aspect: is it viable?

#### **4 – IS THE JOURNEY VIABLE? - THE TRIPLE CONDITION**

The evolution journey can be more challenging than one might imagine. Each cycle behaves like a real project and may involve several areas of the organization (matrix aspect of project management), have the need for financial resources, purchase and implementation of applications (software) and good governance. This work cannot be seen as just another bureaucratic initiative of the area in question. It is a strategic project and should be treated as such. Like any project, there are risks, the main one being that it may lose priority among those involved and be gradually abandoned.

It is, therefore, prudent to assess whether the evolution of the maturity of a department is viable before starting this journey. In my experience as a consultant, there are some CSFs (Critical Success Factors) that can be used to decide whether to evolve. This is the Triple Condition, and we show it in Figure 5.

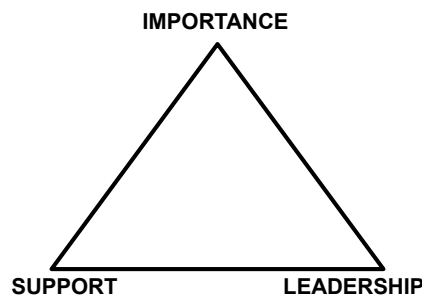


Figure 5: Critical Success Factors: The Triple Condition [3].

The critical success factors are as follows:

##### **1 – High importance of projects for the organization**

- There is a strong need for project results to achieve strategic and/or business objectives and/or to increase the organization's competitiveness.
- Current project results are inadequate or need to be improved.
- For such important projects to deliver the expected results, the use of project management is essential, whether due to the number of projects or due to the complexity of the projects. Without it, the results achieved will be significantly below what would be necessary.
- Furthermore, for evolution to have enough time to occur, project portfolio like those described must exist for several years ahead.

- How to know whether a project portfolio is important to the organization? Answer: By the perspective of the high leadership (C-level).

## **2 – Decisive support from high leadership**

- The high leadership has adequate knowledge of the department projects scenario and is frequently present.
- The high leadership gets involved appropriately whenever necessary to streamline and/or make the project management process more assertive.

## **3 – Strong leadership on the journey**

- There is an institutional leader who fully understands the importance of department maturity development, embraces this cause and works hard for its success.

The above factors must be present TOGETHER and continuous. The absence of any one of them greatly compromises the goal of maturity evolution.

1. If the department's projects are not considered sufficiently important to achieve the organization's goals (or strategies), the other two vertices of the Triple Condition will not find the necessary motivation to continuously engage in the evolution tasks. Certainly, the projects of the various departments of an organization have some strategic and/or business importance. It turns out that some projects are much more important than others. For example, the projects of a department may be intended to keep the machine running through improvements or expansion. Although these have their value, other departments may have projects that aim to reach the organization's strategic goals and are felt to be of higher importance.
2. If there is no strong support from the high leadership, the initiative will run into obstacles that are beyond the team's ability to overcome.
3. If there is no strong institutional leadership to drive the evolution initiatives (mainly involving the responsible department and other departments), the evolution runs the risk of becoming smaller and slowly dying. Who can fill this role? Would it be the PMO leader? Our experience points to the need for a professional above the PMO, since the PMO generally is more technically focused and does not always have the necessary acceptance from other departments. The challenge here is to have a professional who is easy to get along with and who is respected by the departments involved. We call this professional an "institutional leader".

Some progress is possible without some of the above components, but it will certainly be short-term progress, as we will see in the next article. However, we cannot fail to point out some cases we have observed in which, even without the presence of the three components

to the extent mentioned above, it was possible to observe a slow evolution of maturity to a level close to 3.5, where it remained stagnant, which is good. Cases like this occurred mainly due to exceptional performance by the PMO.

Even when the scenario is completely favorable, there is still a long and challenging job ahead, where team building will require talented professionals with dedication and resilience.

## 5 – STAGES OF THE JOURNEY TOWARDS EVOLUTION

In the case of a favorable scenario, the entire journey will follow several growth plans. There should be a plan for each cycle, as shown in Figure 3, and it should be based on the weaknesses that need improvement. To identify these points, it is necessary to carry out a diagnosis of the current situation and the maturity assessment is part of this diagnosis. The complete set of steps is as follows:

1. Initial preparations
2. Simplified or complete diagnosis (includes maturity assessment)
3. Creation of the Growth Plan
4. Execution of the Growth Plan

This topic is covered in detail in our book [2]. We will not cover these steps here in this article as this would be outside the scope of this series, which is to focus on lessons learned and not repeat topics covered in the book.

## 6 – THE IMPORTANCE OF LEVEL 3

One aspect draws attention during the evolution journey: the importance of level 3. In our research, we have a question that addresses the high leadership's perception of the importance of project management in adding value to the organization [1]:

*Regarding the practice of project management (PM): What is the perception of the main stakeholders in senior management about the importance (or value generation) that project management brings to the success of projects and/or businesses in the department?*

- a) PM adds a lot of value
- b) PM adds some value
- c) PM adds little value
- d) PM does not add value
- e) We do not have PM

In Figure 6 we show the results from this question for the 2021 survey:



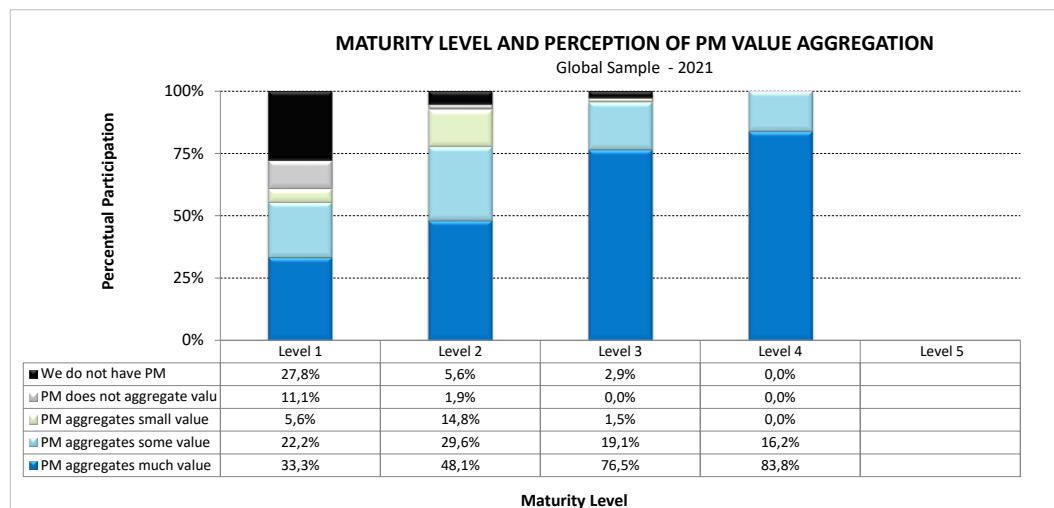


Figure 6: Senior management's perception of the value of PM [1]  
Sample size: Level 1: 18 / Level 2: 54 / Level 3: 68 / Level 4: 37 / Level 5: 4

The result pattern shown in Figure 6 is similar in all the surveys ever conducted on our site since its publication in 2005 [1]. Look at the portion of the bar labeled “PM adds a lot of value” and notice the huge jump in numbers that occurs between levels 2 and 3 (from 48.1% to 76.5%). Why is this?

One of the important benefits of implementing and consolidating level 3 is the resulting simultaneous visibility of all projects in the department (global visibility). This is an aspect that is highly valued by senior executives. A key feature of global visibility is the standardized database containing all projects, as it allows the generation of standardized reports and a dashboard. The dashboard, when created to the taste of C-Level executives, with condensed and quick information, mainly using graphs and indicators, becomes an important ally in managing the organization's larger strategy. The dashboard greatly assists in monitoring, in a visual and intuitive way, the evolution of the main performance indicators of projects, anomalies, risks, etc., as well as the impact of all this on organizational strategies. All of this facilitates the involvement of the senior managers in project governance.

Level 3 represents a break with the status created in level 2, characterized by “each one in his or her own way”. The lack of standardization in level 2 makes it difficult to know what is really happening with each project and whether there are chronic problems spread across the various projects. Decision-making becomes blocked. It also makes it difficult to analyze the causes of these problems, an important aspect for later advancing to level 4. Level 3 corrects problems like these by:

- Implementing a unified platform (processes, tools, organizational structure).
- Basing governance (i.e. decision-making) on unified information, benefiting the project managers and senior management.
- Identifying and analyzing causes of anomalies (they will be mitigated at level 4).

On the other hand, level 3 contains some critical challenges because the improvement in results is not yet so significant (this will occur when level 4 is reached). Please refer to the graph in Figure 1: the evolution of Total Success when going from level 2 to level 3 is not as significant as the evolution from level 3 to level 4.

At level 2, we have an empowerment of those directly involved in the projects, mainly the project managers. At level 3, the PMO's participation in management aspects increases significantly and this presence may not be well received by the project managers. It is a challenge for the PMO leader to deal with behavioral aspects involving several stakeholders. There may also be an expectation that upon reaching level 3 all problems will be solved, but the results obtained may be seen as below what is necessary and may generate frustration.

Therefore, great care must be taken when implementing initiatives to consolidate level 3. Situations such as the following may occur:

- The computerized platform is not user-friendly and/or is not suitable for use by Project Managers, and some are reluctant to adopt the new tools and processes.
- The dashboard does not contain information suitable for decision making by senior executives.
- The team responsible for implementation is inexperienced and focuses more on technical aspects such as spreadsheets, PowerPoint presentations and scheduling software. Simplicity is not always considered.
- Increased bureaucracy.
- Governance meetings may not be assertive, especially high-level ones that end up being ignored and eliminated.

It is important to know these pitfalls and to have a strategy in place to prevent them

## **7– THE KEY LEADERSHIP INVOLVED IN THE JOURNEY**

There are certainly many people involved in the journey of maturity evolution, but two of them stand out for their leadership roles: the PMO head and the institutional leader. Generally, leadership of the evolution of the technical part (particularly tools, processes and training) is the responsibility of the PMO head, which is important, but not enough, since political aspects are equally important in this journey.

The participation of these two leaders takes on different roles as maturity advances. Progressing to level 3 requires two important steps: (1) implementation and (2) consolidation of a unified platform. **Implementation** involves technical aspects such as processes, tools, governance and training, which is the responsibility of the PMO, and the PMO leadership is expected to meet the implementation goals. **Consolidation**, on the other hand, requires that these implemented aspects are effectively and consistently being used by the main stakeholders. This affects the components of the newly created organizational structure

(including committee and sponsors), in addition to generating a new way of working for project managers. Databases must be constantly updated and contain quality data. Here we have a change in culture, as consolidation means that the main stakeholders will constantly work according to the new platform, which needs to be well received by everyone and needs to add results. These challenges may require the presence of more political leadership, and the institutional leader is the appropriate person.

Progress to level 4 (mitigation of anomalies) will require a strong presence of political leadership, since the anomalies may involve departments other than the one where the PMO is based. For example, for construction projects (expansions, new factories, etc.) in a process-industry organization, causes of not achieving goals (with resulting delays, cost overruns, low quality, etc.) may be in departments outside the PMO, such as legal, supplies, IT, etc.

If the PMO leader assumes all fronts of leadership in this journey, a possible lack of experience in aspects of relationships with the various stakeholders can hinder the process, particularly in the advancement to level 4 and in situations where improvements are needed in other departments. Therefore, I would like to emphasize here the importance of institutional leadership in this process (see Figure 5 again). The presence of a leader (usually a director) who believes in the journey and works hard towards it can compensate for a possible lack of experience of the PMO team.

In conclusion, the institutional leader is the sponsor of the “department’s maturity evolution project”.

## **8 – THE HIDDEN CHALLENGES**

The journey towards maturity evolution can encounter an additional category of challenges, in addition to those shown previously in this text. We can call them hidden challenges, as they are not always easy to identify and mitigate. Among them we can mention:

- Reactive organizational culture
- Covert power struggle
- Lack of institutional thinking

The analysis of these challenges will also be addressed in our next article.

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## About the Author



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**Darci Prado** is a consultant and partner of Falconi Consultants in Brazil. He holds a Chemical Engineering degree from UFMG (Federal University of Minas Gerais). He concluded graduate studies in Economical Engineering at UCMG (Catholic University of Minas Gerais) and holds a PhD in Project Management from UNICAMP (Campinas University). He has worked for IBM for 25 years and was a professor at UFMG Engineering School for 32 years. He got the IPMA Level B Certification in 2006. He was one of the founders of Minas Gerais State and Parana State PMI chapters.

In 2005, he pioneered a Project Management Maturity research in Brazil and expanded to Italy in 2010. This research is ongoing, and it is the only one of its kind in the world. He is the author of nine books on project management and is also the author of a PM methodology and a PM software application. As an international speaker, he has been invited multiple times to present in the USA, Italy, France, Portugal and Mexico. Since 2018 he has been working internally with the Falconi CEO, assisting in strategic planning and project implementation.

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