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

### **Maturity Evolution: Towards Excellence<sup>2</sup>**

By Darci Prado, PhD

#### **ABSTRACT**

This is the seventh article in the series *Lessons Learned from Maturity Research*. It examines the evolution of maturity and the role of leadership in this process, focusing on organizations that consciously choose to pursue excellence in their business—or in fulfilling their mission. To fully grasp the discussion, readers are encouraged to review the previous articles in this series [4, 5, 6, 7, 8, 9].

#### Lessons Learned from Maturity Research

Article 1 - Contextualization

Article 2 – Peculiarities of the "Performance versus Maturity" relationship

Article 3 – Heterogeneity Matters

Article 4 – Maturity Evolution: A Challenging Journey

Article 5 – Maturity Evolution: Only a Few Get There

Article 6 - Benchmark Organizations in Project Management

#### 1 - INTRODUCTION

In the previous article (*Benchmark Organizations in Project Management* [9]), we noted that when an organization consciously chooses to pursue excellence in its business—or in fulfilling its mission—certain project areas are compelled to advance their project management capabilities, evolving toward a level of excellence. These areas are typically closely connected to the organization's core purpose and therefore become strategic for achieving excellence. For example, referencing the last article, in the case of the Central Bank, this corresponds to

<sup>&</sup>lt;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. <a href="https://maturityresearch.com/en/home-en/">https://maturityresearch.com/en/home-en/</a>

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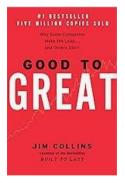
the corporate area responsible for standardization and control of the National Financial System; for Moura Batteries, it is the product engineering area; and for Reta Engineering, the engineering and construction area.

The pursuit of excellence generally implies a goal, a term that can carry multiple meanings. For private organizations, it may involve growth, increased competitiveness, high profitability, and leadership within their industry. For public organizations, it may mean delivering an exceptionally high level of service to the population. In this article, we will use the simplified expression "pursuit of excellence" to encompass these variations.

On this journey, all organizational areas are affected—some more than others—and one or more departments that execute projects usually align most closely with the organization's strategic goals. Here, we analyze the trajectory of such a department as it evolves in project management to better support organizational objectives, with particular emphasis on the role of **leadership**. Throughout this article, we will refer to this as the **strategic department**.

To frame this scenario, we draw on the work of Jim Collins.

#### 2 – "GREATNESS IS A MATTER OF CONSCIOUS CHOICE"



The phrase comes from the book *Good to Great – Why Some Companies Make the Leap... and Others Don't* [3], written by Jim Collins and published in English in 2001, with a Portuguese edition released in 2013. James C. Collins is an American researcher, writer, and lecturer specializing in business management, sustainability, and corporate growth. Author of six books that have sold more than four million copies worldwide, he has influenced thousands of executives. As Jorge Paulo Lemann, a highly successful Brazilian entrepreneur, observed: "some of our most important business decisions were made with the support of Collins' logical reasoning" [11].

In *Good to Great* [3], Collins presents the results of an extensive study analyzing the life cycles of hundreds of American organizations over several decades. His findings show that only a very small number reached a rare level of excellence, achieving extraordinary results well above the national average and sustaining them for more than 15 years.

He also states that beginning the pursuit of excellence means first realizing that the current business model is at risk of being overtaken or that there are more promising opportunities that the organization could pursue and thus gain a prominent position in the market. Continuing, the pursuit of excellence means abandoning the current business model ("comfort zone") and embracing a long journey filled with uncertainty. This may involve shifting markets, adopting new products while abandoning others, placing the right people in the right roles, and letting go of those who do not fit. It is a highly demanding and risky path,

and few are willing to risk their careers for it. For most, it feels safer to remain in the "comfort zone." As he puts it [3]:

"The vast majority of companies never become excellent simply because it is enough for them to be good—and that is their main problem. Greatness, as we have seen, is largely a matter of conscious choice." [3]

The comfort zone does have its appeal. But that doesn't mean their day-to-day lives are easy. It is where organizations are created, grow, and compete for survival and growth. Some rise to prominence, others are acquired, and still others disappear. Only a few endure for a century, and even fewer choose to pursue excellence (Figure 1).

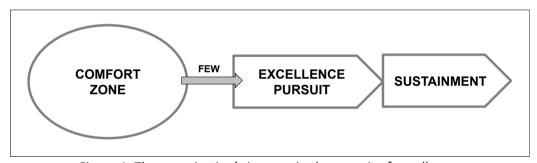


Figure 1: The organization's journey in the pursuit of excellence.

#### 3 - STAGES TOWARD EXCELLENCE

Figure 1 illustrates the key stages in an organization's pursuit of excellence, inspired by the book *Built to Last* [3]. We will use this framework to examine how project-oriented departments evolve—beginning in the less demanding "comfort zone," where many remain for years, until they are eventually called to align with the organization's pursuit of excellence.

Please note that in this text we will draw a parallel between two journeys:

- The pursuit of excellence undertaken by American organizations, as narrated in Collins' book [3].
- The journey of a strategic department in Brazil toward excellence in project management (maturity levels 4 and 5), based on data from the maturity research [1], testimonials from benchmark organizations [9], and our practical experience as a consultant.

## PART A – THE COMFORT ZONE "NOT ALL ASPIRE TO BE EXCELLENT – IT IS ENOUGH TO BE GOOD"

#### 4 - MOST DO NOT GET THERE

As discussed in the article *Maturity Evolution: Only a Few Get There* [8], between 2005 and 2024 only 12% of Brazilian organizations reached the levels of excellence (levels 4 and 5) in project management. In 2024 specifically, this percentage was 13%, as illustrated in Figure 2.

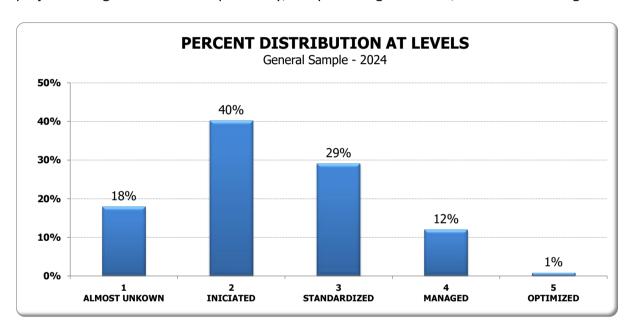


Figure 2: Percentage distribution across maturity levels in 2024 [1].

Levels 1, 2, and 3 are closely associated with what we call the "comfort zone."

By looking at the performance chart of departments participating in the 2024 survey (Figure 3), we can observe that the high-performance group (levels 4 and 5) shows a total success rate much higher than the other groups. Thus, remaining in the "comfort zone" carries a performance cost, but most choose to live with this situation. This is only sustainable as long as market challenges and competition allow it.

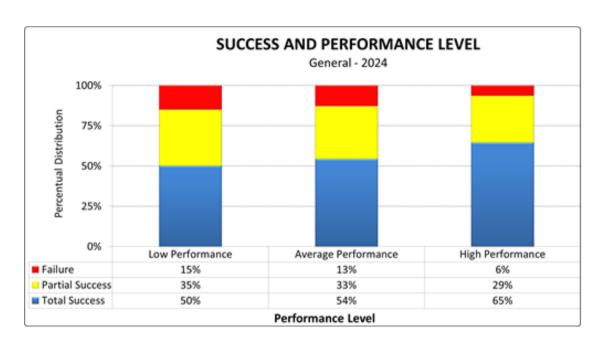


Figure 3: Performance by maturity levels in 2024 [1].

To advance the discussion, we will next examine the scenario of departments that remain in the "comfort zone."

#### 5 - THE MATURITY JOURNEY IN THE COMFORT ZONE

Does maturity evolve in organizations that remain in the "comfort zone"? Yes— since the organizational environment is dynamic rather than static. Even in the "comfort zone," some organizations eventually realize that small changes are necessary, whether to improve processes (administration, commercial, production, IT, etc.) or to expand production slightly. Such initiatives are not frequent, but they are needed to keep pace with competitors.

At first, these efforts are usually led by professionals from the operational areas themselves, working intuitively alongside their normal duties. The projects are so simple that they are often not even recognized as projects. This corresponds to a typical scenario of **Maturity Level 1**.

#### The Evolution to Maturity Level 2

As competition increases, change becomes more frequent and complex. These efforts are now clearly projects, and it becomes evident that intuition alone is insufficient. To cope, the department begins adopting the fundamentals of project management. Scheduling software is acquired, training is provided, and some employees attend conferences. Each still works in their own way, balancing projects with routine responsibilities. A PMO may occasionally be created, adding some value (training, etc.), but it doesn't change the way of working and may have an uncertain lifespan. It may grow, be well-received, and be seen as strategic for the

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organization. But it may be closed after a few years under the pretense of "no longer being needed." And, if new needs arise, it may be reopened sometime later, and the cycle may continue. This way of working (each in their own way) prevents a comprehensive understanding of the performance of ongoing or completed projects. This is a serious problem, as the same mistakes can be repeated over and over again. **This is the typical scenario of Maturity Level 2**, which represents most Brazilian organizations (Figure 2).

#### The Evolution to Maturity Level 3

As the business context becomes more complex, strategic planning expands, and the number of projects increases. Some projects now require full-time managers, and the term "project manager" enters the organization's vocabulary. Standardization and broader training also become necessary. A small PMO (one or two people) may be formed, often led by a young professional—either promoted internally or hired from the market—who has formal training in project management (such as an MBA) and practical knowledge of scheduling software (e.g., MS Project). However, lack of real-world experience can make it difficult for this leader to deal with stakeholders, as theory does not always align with practice. At this stage, PMOs typically report to a financial, engineering, or administrative directorate, whose leadership often has limited understanding of project management.

Over time, the PMO may grow and accumulate experience. By participating in conferences and exchanging knowledge with peers, its leader improves processes and systems, positively impacting project managers. This represents an attempt to evolve to **Level 3 maturity**. When the situation is favorable, some departments manage to reach Level 3 after a long period, thanks to the excellent work of the PMO and project managers. In this scenario, we have a platform with a unified database, which allows for better performance analysis of each project and the entire portfolio. Dashboards are also available. All of this represents a significant improvement over the previous level (each in its own way) and can create a positive perception of the department's work.

However, even with all this progress, we don't always have adequate support and involvement from senior management. Transformations involve a cultural shift, and reactions can arise. Thus, many departments fail to consolidate Level 3 and remain at Level 2 due to the challenges that arise, as discussed in the 5th article of this series ("Not Everyone Gets There") [6]. As we will see below, consolidating Level 3 may require additional skills from the PMO team.

Many fail to consolidate Level 3 and remain at Level 2 due to the difficulties that arise, as discussed in the 5th article of this series ("Not Everyone Gets There") [6]. Reaching Level 3 requires additional competencies within the PMO team.

A common characteristic of organizations in their "comfort zone" is apathy toward bolder initiatives in their business model, its management and their organizational culture [3]. This is critical because it hinders the development of project management in these organizations.

Not forgetting to mention here an additional threat to the survival of the project management practice: the end of a strategic cycle can, temporarily, strongly affect the project management structure of an organization, and may even lead to the extinction of the PMO.

Comment: the journey described at this item does not capture every possible scenario. It serves only to illustrate how projects emerge within organizations and how maturity may evolve in the comfort zone. Importantly, the timeframes for each stage of this journey tend to be long and drawn out.

# PART B – THE PURSUIT OF EXCELLENCE "GREATNESS IS NOT A FUNCTION OF CIRCUMSTANCE. GREATNESS, IT TURNS OUT, IS LARGELY A MATTER OF CONSCIOUS CHOICE" [3]

#### **6 – THE PURSUIT OF EXCELLENCE**

At a certain point, an organization may consciously choose to pursue excellence—an intentional decision that forces it to leave the "comfort zone."

In Collins's research [3], this decision most often occurred as an isolated initiative of the CEO, a distinguished professional whom Collins calls a "Level 5 Executive". He perceives a threat or opportunity scenario and concludes that the organization needs to make severe changes to position it prominently in the segment in which it operates or will operate. Then, calmly, prudently, and with discipline, he assembles a team of exceptional people with whom he debates his dream at length. The debate is about confronting the raw truth. The dream is deepened, improved, and embedded in a new culture. These same people will lead future organizational transformation programs and projects. At some point, there is a rupture with the old model, and the construction of the new one begins.

From this point forward, challenges grow significantly, and the level of pressure rises. Numerous initiatives are required, many of which directly involve the organization's strategic department of projects.

The maturity level of this strategic department at this moment can vary widely, as observed in the benchmark cases presented in the previous article (*Benchmark Organizations* [9]):

Central Bank: 2.16Moura Batteries: 2.10Reta Engineering: near 3

Regardless of the starting point, the department must now deliver higher levels of project success. Inevitably, this need clashes with the prevailing culture and organizational structure, making it clear that urgent progress in project management maturity is essential. At this stage, project managers and the PMO become the center of attention. The organization may restructure its project function and/or seek support from external consulting firms.

#### The Gap Between the PMO and the C-Level

A recurring theme for a long time in literature and in project management events is the difficulty of communication between the organization's top leadership and the PMO team (particularly its leader). This difficulty becomes especially evident when the department advances toward Level 3 maturity. At this stage, it is necessary to strengthen governance, implement and consolidate a unified management platform across stakeholders, identify the root causes of anomalies (delays, cost overruns, etc.), and deliver more advanced training programs.

This requires not only technical skills but also behavioral competencies (e.g., leadership) and contextual competencies (e.g., navigating organizational culture). Yet, PMOs often remain locked in their own technical universe. Lacking broader vision, they struggle to clearly define the next steps—and, more critically, to communicate them effectively to top management. Conversely, executives often fail to understand the PMO's challenges and limitations. They expect the PMO to contribute to the journey toward excellence with the same speed and quality as other areas of the organization. Moreover, the technical jargon commonly used by the PMO can be a barrier, creating distance and hindering meaningful dialogue.

In other words, at this stage the organization faces a communication gap between the PMO and top management.

What's missing at this point in the journey? Why are some organizations able to break out of this situation (which results in average project management results) while others aren't?

#### 7 – MATURITY EVOLUTION: CRITICAL SUCCESS FACTORS (CSF)

To advance this discussion, let us revisit Article 4 of this series – *Maturity Evolution: A Challenging Journey* [7] – where we demonstrated that certain factors are critical for the evolution of project management maturity. These conclusions are drawn both from consulting experience and from the analysis of benchmark organizations that participated in

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the research (see Article 6 [9]). In that earlier work, we referred to them as the **Triple Condition** (Figure 4).

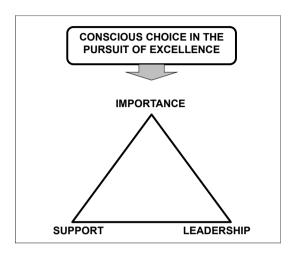


Figure 4: Critical Success Factors – The Triple Condition [7].

#### 1 – High Importance of projects to the organization

- There is a strong need for project results to achieve strategic and/or business objectives, or to enhance 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, either due to the number of projects or their complexity. Without this, results fall significantly short of what is required.
- How to determine whether a project portfolio is of high importance to the organization? Answer: from the perspective of top management.

#### 2 – Decisive support from top management

- Top management has an adequate understanding of the project environment.
- It becomes appropriately involved whenever necessary to expedite and/or make the project management process more assertive.

#### 3 - Strong leadership in the journey

• There must be an "institutional leader" who fully understands the need for maturity evolution, embraces this cause, and works diligently for its success.

The first factor is certainly present, since we are dealing with a strategic department whose projects are critical to the organization's pursuit of excellence. The same applies to the second factor (engagement of top management), given the strong interest of the CEO.

And the third factor: leadership? Would this refer to the PMO leader?

This aspect was raised in article 4 [7], and here we will go further. Let us revisit what we wrote about leadership:

"If there is no strong institutional leadership to drive the initiative (both with the executors and with other areas), the journey toward maturity evolution runs the risk of dwindling and gradually fading away."

This raises important questions:

- What exactly is meant by an "institutional leader"?
- Why is this role necessary?
- Could the PMO leader fill this position? If not, how can such a leader be identified and engaged?
- What is the relationship between this figure and the PMO leader?

To address these questions, we must take a closer look at the PMO environment.

#### 8 – THE CHALLENGES OF A PMO IN MATURITY EVOLUTION

There are several types of offices related to projects, each with different names and functions. In this article, we will use the generic term PMO to encompass all of them.

Since its emergence in the 1990s, the PMO has retained its relevance—yet arguably greater in project management conferences than within the organizations themselves.

The recent creation of the PMOGA® (PMO Global Alliance) by PMI®, along with the long-standing "PMO of the Year" award, has reinvigorated enthusiasm around this subject. Furthermore, new models continue to emerge, such as strategically oriented PMOs, where the leader is elevated to the c-level under the title Chief Project Officer (CPO) [10].

To understand the challenges faced by a PMO, in this article we focus on the most common model found in Brazil between 2005 and 2024—namely, **the PMO with a predominantly technical profile.** We believe this model is still the most frequent in the country.

Despite such advances, in Brazil the most common model during the period between 2005 and 2024 has been the **technically oriented PMO**. We believe this remains the dominant model in the country. This model has proven highly effective for:

- establishing and implementing process standards,
- deploying tools and organizational structures,
- defining governance practices,
- training professionals,

- · supporting project planning and monitoring, and
- maintaining limited interaction with top management.

From the perspective of maturity evolution, this model enabled departments to implement project management elements—mainly processes, tools, and organizational structures—thus reaching maturity levels slightly below 3. At this stage, the challenges were predominantly **technical**, and PMO staff were generally able to overcome them.

However, consolidating level 3 and advancing to level 4 introduced new challenges of a different nature. At this stage, in addition to an increase in technical complexity, cultural and political challenges emerged:

- Technical complexity: implementing and consolidating a platform (processes, tools, structures, and governance) generally implies working in a more complex technical environment. Specific aspects must be considered. For example, traditional success indicators (time, cost, scope, and quality) are not always sufficient or the most appropriate for measuring project success. Indicators must be aligned with the needs of senior management, who may want, for example, to also see financial data, productivity, etc., all in one place (dashboard). Each case is unique, and the solution must be in-house, as project management practices are often broad and heterogeneous. Without attention to these points, maturity will not reach level 3 or evolve to level 4.
- **Cultural change**: consolidating the platform requires consistent use of the new way of working by all stakeholders, including c-suite executives. The new scenario may clash with the existing culture, and adverse reactions may occur. Project managers, in particular, may be reactive to the new way of working recently implemented by the PMO (processes, tools, and governance) if it doesn't prove user-friendly and appropriate.
- Matrix interaction: advancing to level 4 requires mitigating the causes of anomalies (delays, cost overruns, scope failures, etc.). Often, these causes lie in areas outside the PMO, demanding negotiation and influence with the respective managers and top leadership.

These challenges occur both in organizations where projects are external (i.e., project-oriented organizations, such as construction companies and government entities) and in organizations where projects are internal, aimed at improving or expanding internal operations.

It is expected that the PMO leader will spearhead the journey toward maturity evolution, but the challenges involved transcend the typical technical background of a PMO leader. Although

some leaders acquire the necessary competencies through experience, most encounter limitations. At this point arises the need for external support from a professional with strong political skills and the ability to influence and negotiate: the so-called **institutional leader**, a figure essential to support maturity evolution.

#### 9 - THE "INSTITUTIONAL LEADER"

The presence of an institutional leader is decisive at moments when the department seeks to advance its maturity. When well chosen, this professional should occupy a hierarchical position equivalent to that of the c-Level—something rare among PMO leaders—granting authority and the ability to remove obstacles that require executive-level action.

#### Who is the "Institutional Leader"?

The analysis of benchmark organizations in project management [9] provides insight into who may take on this role:

- **Director of a strategic area**: in organizations heavily dependent on projects (such as construction companies or public entities), the area director may naturally perform this function.
- **Development director**: in companies undergoing accelerated expansion, with a recently created directorate.
- Influential director external to the PMO: in organizations where the PMO is hierarchically at a lower level, the "institutional leader" may be a respected director, even outside the PMO's direct reporting line.
- **Committee**: in some governmental organizations, the role is sometimes performed by a group of leaders rather than a single person.

#### Functions of the "Institutional Leader"

The main responsibilities include:

- a) Being fully aligned with the organization's pursuit of excellence (certainly the primary responsibility).
- b) Influencing top management (particularly the CEO) to support initiatives led by the PMO in the journey toward excellence (levels 4 and 5).
- c) Supporting the PMO leader in identifying and implementing actions aimed at maturity evolution.
- d) Participating in high-level governance meetings to monitor projects, programs, and portfolios, ensuring that new practices are being adopted.

- e) Assisting the PMO leader in mitigating anomalies (delays, costs, scope, quality) that fall within the PMO's sphere of influence.
- f) Influencing areas outside the PMO's sphere of influence—especially when they exhibit performance issues (delays, etc.) to improve their processes and become more efficient.

#### How to Identify and Secure the Engagement of the "Institutional Leader"?

Ideally, this initiative should come from the CEO, given his or her full commitment in the organization's pursuit of excellence and the strategic department's crucial role in that journey.

If this does not occur, the initiative should come from the PMO leader in partnership with their immediate superior (usually a financial or administrative director). In such cases, both must be aware of the PMO leader's limitations and strive to secure an active, strong, and respected sponsor. However, the invitation is not always accepted or understood, and even when support exists, it may prove ineffective. This is certainly one of the causes contributing to the phenomenon "not all get there," discussed in Article 5 [8].

When properly chosen the "institutional leader" and the PMO leader must work in close alignment, sharing objectives. The presence of an effective "institutional leader," working in close partnership with the PMO leader, significantly enhances the department's ability to overcome the difficulties of the journey toward excellence in maturity. The combination of political leadership and technical competence is a decisive factor in sustaining consistent progress.

However, it must be remembered that the transition from level 3 to level 4 can be lengthy (for example, lasting up to three years), and continuous dependence on this support may not be sustainable. Thus, the PMO leader must gradually develop political skills to maintain progress even when the "institutional leader's" presence becomes distant and less frequent. In this evolution, the PMO leader develops many attributes. The benchmark organizations analyzed in Article 6 – Maturity Evolution: Benchmark Organizations [9] – show that the profile of PMO leaders in departments that reached the level of excellence (levels 4 and 5) includes attributes such as:

- Seniority
- Leadership
- Ability to interact with and secure the engagement of the c-suite in the maturity evolution journey
- Strong acceptance and credibility across organizational areas external to the PMO
- Strong knowledge of the organization's business and its pursuit of excellence

- Clear understanding of the importance of project results for the organization's business
- Deep knowledge of the status of each project in the department throughout its life cycle (planning and execution stages)
- · Strong expertise in advanced aspects of project management
- Ability to guide the development/acquisition of appropriate training for the various stakeholders in project management

#### The Role of Consulting

We must also highlight the importance of support from a competent consulting firm in advancing maturity, as confirmed by the testimonials of benchmark organizations in Article 6 of this series – *Maturity Evolution: Benchmark Organizations* [9]. Consulting firms are usually hired by a senior executive (e.g., the CEO) to help boost the required results and to assist in the development or improvement of processes, tools, organizational structures, and governance. However, due to their credibility and easy access to the client (especially the csuite), the tasks in which consulting adds the greatest value are acting in a role equivalent to that of the "institutional leader" in the early stages and enabling the PMO leader to better perform their political functions within the organization.

#### 10 - THE "SUSTAINMENT" STAGE

In Figure 1, we observe that, after reaching the level of excellence, and in order to remain among the select group of excellent organizations, it is required that the organization sustain the same results over a long period (more than 15 years) [3].

Our research did not collect this type of information, but it is important to note that in the testimonials of the three case studies presented in the previous article – *Maturity Evolution: Benchmark Organizations in Project Management* [9] – this aspect was observed once the department had reached the level of excellence (levels 4 and 5), and it has remained consistent until the publication of this article.

#### 11 - FINAL CONSIDERATIONS

In this article, we presented the trajectory of an organization in its pursuit of excellence in its mission, as well as the trajectory of a strategic department toward the level of excellence in project management.

As mentioned at the beginning of this article, there is some similarity between our study and the one conducted by Jim Collins and described in the book *Good to Great* [3]. Both addressed the journey toward excellence.

There is, however, a difference between the objectives and conclusions of the two studies. Collins' work aimed to identify and analyze organizations that reached the pinnacle of excellence in the highly competitive U.S. market. His study was based mainly on financial data. Our study, on the other hand, was limited to identifying departments that reached the level of excellence in project management in Brazil, using a maturity research that captures data on project management in the respondent's department. In the American case, only 11 organizations were identified, whereas in our case, we showed that 12% of the sample reached the level of excellence in project management, and we estimate that more than 200 departments are currently at this level. We wish to make it clear that we are not stating that there are more than 200 Brazilian organizations at the same level as the 11 highly efficient American companies. On the other hand, if our research were applied in the U.S. context, it would certainly identify some thousands of departments at the level of excellence in project management.

In the Brazilian sample, we may find one or another organization as outstanding as those identified by Collins in the American context, but we certainly also find organizations in the "second" or "third battalion" of excellence.

We believe that reading Collins' book [3] may serve as an inspiration to those engaged in the journey of maturity evolution in project management within their departments, as it enables a better understanding of the synchronization between the organization's pursuit of excellence.

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#### About the Author



Darci Prado, PhD

Belo Horizonte (MG) - Brazil



**Darci Prado** is a consultant and partner of Falconi Consultants in Brazil (https://en.falconi.com/). 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, together with Russell Archibald, 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 regarding the analysis of the relationship between maturity levels and success for long period of time (20 years). As an international speaker, he has been invited multiple times to present in the USA, Italy, France, Portugal and Mexico. He is the author of nine books on project management (<a href="https://www.editorafalconi.com/loja?lang=en">https://www.editorafalconi.com/loja?lang=en</a>) and is also the author of a PM methodology and a PM software application.

He is also the author of a series of three books about Operations Research and one book about innovation. All his books have sold 100K+ copies in Brazil, Italy and Spain.

He is an Honorary Industry Advisor of PM World Journal (<u>Honorary Industry Advisors</u> <u>PMWorld Library</u>) and a member of the Editor Board of MundoPM Magazine (<a href="https://projectdesignmanagement.com.br/institucional/conselho-editorial/">https://projectdesignmanagement.com.br/institucional/conselho-editorial/</a>).

Since 2018 he has been working internally with the CEO of Falconi Consultants, assisting in strategic planning and project implementation.

Darci can be contacted at <a href="mailto:darciprado@uol.com.br">darciprado@uol.com.br</a>.

To see more works by Darci Prado, visit his author showcase in the PM World Library at <a href="https://pmworldlibrary.net/authors/darci-prado-phd/">https://pmworldlibrary.net/authors/darci-prado-phd/</a>.