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Playbook for Securing and Managing External Funding

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► To cite this version:

Lea Stadtler. Playbook for Securing and Managing External Funding. Grenoble Ecole de Management. 2025. <hal-05303500>

HAL Id: hal-05303500

<https://hal.science/hal-05303500v1>

Submitted on 8 Oct 2025

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PLAYBOOK FOR SECURING & MANAGING EXTERNAL FUNDING

Workshop Insights “External Research Funding:
Best Practices and Untold Truths” (AOM, 2025)

Research grant ANR-22-CE26-0009 Cross-PASSE has supported the development of this document.

Lea Stadler
Grenoble Ecole de Management

INTRODUCTION

In recent years, many universities have intensified expectations for scholars to secure external funding to sustain their research agendas. While administrative support is often available to help manage grant-related logistics, scholars are frequently left to navigate the strategic dimensions of funded projects largely on their own.

At the **Academy of Management Annual Meeting 2025**, we organized a **workshop** for discussing key questions to ask for approaching external funding strategically and for sharing best practices of handling external funded projects successfully.

This **playbook** is a summary of the most relevant insights discussed at the workshop, together with key questions that may guide your external funding decisions and project management approach.

Workshop Impressions

Approaching External Funding Strategically
Amelia & Dorothee

Managing the Project
Oda & Verena

Different Funding Options
Lea & Corey



COLLABORATORS

Organizers of the workshop
“External Research Funding: Best Practices and Untold Truths” at the Academy of Management Annual Meeting 2025 in Copenhagen.

The organizers would like to thank the many participants who shared their thoughts and experiences at the workshop.

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APPROACHING EXTERNAL FUNDING STRATEGICALLY

What is the optimal timing, scope, and career stage for applying for external funding?

And how to align funding opportunities with personal and professional goals?

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Shared Experiences

Define Your Purpose: Start by asking why you need funding and for what purpose.

Start Small: Begin with smaller opportunities, such as travel grants, to build a funding track record.

Gain Visibility Through Teams: Consider joining larger teams or serving as a co-PI, especially in early career stages, to gain experience and visibility.

Factor Institutional Support: Recognize that institutional support and expectations vary, factor this into your strategy.

“Institutional support may include sharing examples of successful proposals for specific funding schemes, reviewing applications based on evaluation criteria and public appeal, and providing seed funding to prepare large-scale projects.”

Amelia Clarke, University of Waterloo

Match Funding to Career Stage: Early-career researchers often pursue individual grants, while mid-career researchers can consider international or cooperative funds.

Diversify Funding Options: Explore a variety of funding modalities, including contracts or partnerships with the private sector, not just traditional research grants.

Survey Options Broadly: Explore regional, national, bilateral, European, and international funding opportunities.

Network Strategically: Ask colleagues and your institution about funding opportunities and learn from past grantees.

“Don't wait: The easiest (i.e. individual) funding options are typically reserved for early-career scholars.”

Lea Stadtler, Grenoble Ecole de Management

“Start with your research goals: Are you looking to co-create knowledge with practitioners, grow international ties, or fund fieldwork? Aim for grants that are more than career fuel, they should directly advance your research goals.”

Verena Girschik, Copenhagen Business School

CONSIDERING DIFFERENT FUNDING OPTIONS

What funding sources are available, including government agencies, nonprofit organizations, industry actors, and crowdfunding?

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Shared Experiences

Choose Alignment: Apply for funding that aligns with research you would pursue anyway, so the time it takes to develop a proposal is invested well.

Consider Reapplying: Favor schemes that permit resubmissions, allowing you to refine your proposal and build on previous efforts.

Frame for Impact: Align proposals with the funding scheme topic, emphasizing societal relevance.

Tailor to the Funder: Adjust tone and content to match the funder's mission and priorities, seeking guidance and mentorship when possible.

Think Systematically: Approach the proposal as a research project that not only addresses a specific question but also contributes meaningfully to your overall research agenda and career planning.

“Approach it with the mindset of a research project (e.g. exploring a topic or question from multiple angles and analyzing it systematically) rather than simply aiming to produce a paper.”

Lea Stadler, Grenoble Ecole de Management

CRAFTING SUCCESSFUL FUNDING PROPOSALS

What is the most important strategic consideration when deciding whether to pursue a specific funding opportunity?

What types of narratives or framings have you found effective (or ineffective) when writing proposals for interdisciplinary or socially relevant research?

CRAFTING SUCCESSFUL FUNDING PROPOSALS

What is one key mistake you made or witnessed in an unsuccessful proposal, and what would you do differently?

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Shared Experiences

Understand Proposal Skills: Recognize that writing funding proposals requires different skills than academic writing.

Clarify Team Roles: Avoid failing to define responsibilities early in team applications.

Respect Time Demands: Large grants require careful attention to administrative and research workload to avoid overcommitment.

Plan for Multidisciplinarity: Anticipate the challenges of interdisciplinary projects and ensure team members can collaborate effectively, including supporting junior researchers.

Plan Scope Carefully: Consider funders' expectations regarding timelines, outcomes, and reporting, while remaining attentive to privacy and liability issues and that they are managed well.

“Be mindful of the practical challenges in interdisciplinary projects, and indicate how you plan to address them. While such collaborations offer rich insights, they require effective communication across disciplines to avoid misunderstandings and fragmentation. Good evaluators will check whether potential coordination challenges are adequately anticipated.”

Jasper Hotho, Copenhagen Business School

BUILDING EFFECTIVE PROJECT TEAMS

What are your strategies for recruiting the right people—whether team members, advisors, or collaborators—at different stages of an externally funded project?

“Allow sufficient time for recruitment and onboarding to build shared understanding of project goals and team roles, acknowledging these may need adjustment, such as in response to access challenges or changing field conditions.”

Oda Hustad, Roskilde University

Recruit Carefully: Recognize that team composition is crucial and recruitment may take multiple attempts to find the right candidates.

Balance Admin and Research: Set boundaries early and communicate the importance of research leadership to maintain balance with administrative duties.

Onboard Thoroughly: Allocate sufficient time for recruitment and onboarding to build shared understanding and clarify roles.

Prioritize Fit for Interdisciplinarity: Ensure junior researchers have experience relevant to the project’s focus and methods.

“Interdisciplinarity is good, but be careful at the junior level. For postdocs in particular, it's important to recruit candidates whose prior research is reasonably aligned with the project’s topic and methods, and who have been properly trained in its approach.”

Oda Hustad, Roskilde University

Coordinate Large Teams: Use regular meetings, workshops, and Q&A sessions to maintain methodological consistency.

Motivate With Benefits: Offer intermediate rewards, such as joint publications and conferences, to maintain engagement.

Involve Knowledge Users: Co-create the research focus, data collection instruments, interpretation of results for practitioners, and/or dissemination strategy with knowledge users to ensure impact.

Organize Publications Strategically: Identify author interests in advance and group topics with anchor people.

Leverage Graduate Students: Utilize students for both practice-oriented and research-oriented analyses to strengthen project outcomes.

“Schedule regular informal meetings where everybody is invited to share what's on their mind. These check-ins create space to address small issues before they escalate—and remind us that we're part of a team, even when we're busy with our own sub-projects.”

Verena Girschik, Copenhagen Business School

MAINTAINING EFFECTIVE PROJECT TEAMS

What are your strategies for involving key stakeholders—whether team members, advisors, or collaborators—at different stages of an externally funded project?

ENSURING SUSTAINABILITY AND IMPACT

What does long-term impact mean for you in the context of externally funded research, and how do you plan for it?

What lessons have you learned about managing dissemination across academic and non-academic audiences?

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Shared Experiences

Impact on Practice: Long-term impact means improving the ability of actors to respond effectively to comparable situations in the future.

Impact on Research Capacity: Building academic capacity involves nurturing new talent and creating teaching materials that can be adopted more broadly.

Disseminate Continuously: Treat dissemination as an ongoing process rather than a final stage.

Provide Early Insights: Share emerging findings with practitioners to support real-time decision-making.

Maximize Practical Value: Use aggregated data to inform practice while contributing to theoretical knowledge.

“A recurring challenge is that funders seek research on current issues, while formal dissemination often lags behind academic publication—too late for practitioners needing timely insights. To address this, we now view impact as unfolding alongside academic work. Practitioners benefit from emerging findings, and early sharing of aggregate data has proven valuable, for instance, helping humanitarian actors mobilize resources more effectively.”

Jasper Hotho, Copenhagen Business School

MORE FOOD FOR THOUGHT

Approaching external funding strategically

What support does your institution provide?

Considering different funding options

What are the implications of individual vs. collaborative projects and small vs. large-scale projects?

Building and maintaining effective project teams

How do you handle team turnover, especially in long-term projects?

What are your strategies for balancing administrative responsibilities with research leadership?

Ensuring sustainability and impact

How do you ensure that research outputs are not only published but also have a positive impact on relevant practitioners or communities?

How do you maintain project momentum once initial funding ends?

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