1. Portfolio Overview

- Track all supported projects in one place
- Understand performance across your portfolio at a glance
- Quickly identify top-performing projects, trends, and benchmarks
- Move seamlessly from portfolio-level analysis to project-specific detail

2. Roles & Responsibilities

TMP oversees:

- New project approvals
- Portfolio and project-level performance
- Audience reporting and insights
- Broadcaster / VOD data coordination (where applicable)

Producers manage:

- Media account linking
- Content tagging and organization
- Additional data inputs (e.g. festivals, awards, earned media)

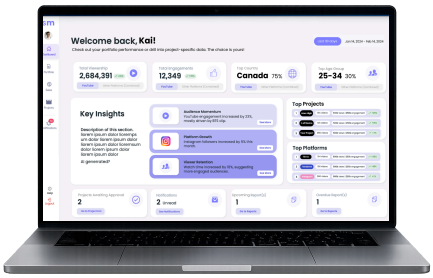
This setup keeps the Funder experience focused on insights, not setup.

3. Workflow

A simple, ongoing workflow to help your team get the most out of ScreenMiner:

- Approve new projects directly from your homepage
- Monitor portfolio performance regularly
- Create custom audience reports for producers and track submissions
- Collaborate with ScreenMiner's Customer Success team to optimize your UX

Te Māngai Pāho



Project Onboarding Checklist (for Producers)

Setting up your project in ScreenMiner™ is fast and easy! Use this checklist to prepare for your onboarding session.

To set up your project, you'll need the following:

- ☐ Project Pre-Launch Date (First day marketing or promo lands in market)
- ☐ Project Launch Date (Release date of primary content, e.g. premiere, live broadcast)
- ☐ Total Budget (Includes all costs related to programming, non-programming, marketing, and discoverability)
- ☐ Seasons & Episodes (If applicable, # of episodes, release dates and duration)
- ☐ Project Components (e.g. marketing strategies, website, social channels, live events, etc.)

Account Access

You'll need admin credentials for any accounts you'd like to connect:

- ☐ Google Analytics Account(s)
- ☐ *Google Ads Account(s)
- ☐ **Facebook Page(s)
- ☐ Facebook Ads Account(s)
- ☐ YouTube Account(s)
- ☐ ***Instagram Account(s)
- ☐ Twitter Profile(s)
- ☐ Vimeo Account(s)
- ☐ ****TikTok Account(s)

*Google Manager account access required
**A Facebook Page must be created in order to link Instagram
***Instagram business account linked to the Facebook page is required
****Please note that TikTok only tracks data up to the previous 60 days

Before Your Session

- Enable screen sharing
- Disable ad blockers
- Allow pop-ups in your browser

We look forward to onboarding your project!

For any questions, please contact support@screenminer.com

