

# *iSoftpull*

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*credit intelligent webforms*

# *Credit Webforms Overview*

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I N T R O D U C I N G

# *The World's Most Advanced*

C R E D I T P R E - Q U A L I F I C A T I O N W E B F O R M S

## **Get Pre-Qualified!**

Instantly check if you pre-qualify for a loan.  
Checking will **not** impact your credit.

First Name *	Last Name *	
<input type="text"/>	<input type="text"/>	
Address *		
<input type="text"/>		
City *	State *	Zip *
<input type="text"/>	<input type="text"/>	<input type="text"/>

I give consent to pull my credit for pre-qualification purposes.

**Get Pre-Qualified!**

***iSoftpull's Credit Intelligent Webforms enable your company to do what no other webforms enable you to do: display credit-relevant messaging, links, and url redirects specific to each unique lead based on your client's exact FICO® Score.***



**pre-qualified**

I N T R O D U C I N G

# ***Credit Intelligent Webforms***



## ***What is a form builder?***

iSoftpull Credit Webform Builder is a tool to build embeddable forms on your website to process credit applications programmatically.



## ***What is the purpose of a form builder?***

The purpose of the Form Builder is to capture consent, process applicants, and automate pre-qualification to instantly inform clients or employees if an applicant is pre-qualified.



## ***What is the result of using a form builder?***

By utilizing Credit Intelligent Forms you will generate more leads, identify quality leads, and scale your organization while remaining FCRA compliant.

# Credit Intelligent Webforms

B E N E F I T S F O R Y O U R C O M P A N Y



## ***Automation***

Integrating your business' technology plays an integral role in growing your company. By programmatically processing applicants online your business will save time and money... and close more deals!



## ***Efficiency***

Automation enables you to allocate your time on deals that are pre-qualified and are most likely to close.



## ***Scalability***

Automated webforms enable you to create unique forms for each employee, referral partner, or campaign, which in turn allows you to process more applicants, faster!

# Credit Intelligent Webforms

B E N E F I T S F O R Y O U R C L I E N T S



## ***Instant Pre-Qualification***

Let's be honest, the today's consumer has an instant gratification mindset, and getting approvals for a loan is no exception!



## ***No Harm to Credit***

Consumers want to know whether or not they are qualified before they ding their credit with a hard pull, and rightfully so! iSoftpull's enables you to inform clients of their approval probability, instantly!



## ***No SSN or DOB Required***

Your customers no longer have to give up their sensitive information in order to know if they qualify. All iSoftpull needs to pull credit is a name and address only, and we can retrieve a full credit file and FICO® Score.

# Credit Intelligent Webform Types

TWO TYPES TAILORED TO YOUR NEEDS



## APPLICANT *facing*

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Your client initiates the pre-qualification process on your website.



## EMPLOYEE *facing*

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Your employee fills out the form and receives notification if their client is qualified.

# Webform Compliance

ROBUST FCRA COMPLIANT WEBFORMS

Function	Admin	Manager	Employee
Create Forms	✓	✓	
Edit Forms	✓	✓	
Assign Forms	✓	✓	
Share Forms	✓	✓	
Use Forms	✓	✓	✓

*Your compliance team will be set at ease with iSoftpull's role-based Credit Intelligent Webform management and instant Written Instructions capture. Through iSoftpull's form management and employee assignment capabilities, your company will benefit from credit automation, while limiting the company's exposure to compliance risks.*



W E B F O R M S F U E L E D B Y

# *Credit Intelligence*

**iSoftpull**

Intelligence Result

 TransUnion

Intelligence: Gold Tier      Score Limit: 750

Score Version:  
 FICO SCORE 8

Intelligence Result

 EQUIFAX

Intelligence: Silver Tier      Score Limit: 625

Score Version:  
 FICO SCORE 8

**FICO**

*The intelligence feature of iSoftpull's Credit Webform is a key differentiator setting our web forms. By injecting Credit Intelligence, your forms create relevant messaging to a specific lead based on their credit score.*

**Intelligence can be applied to both applicant-facing and employee-facing form types.**

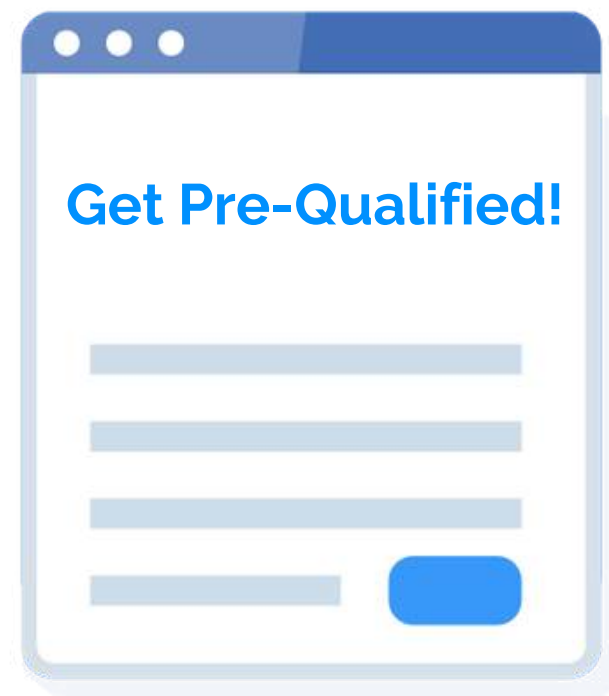
# Credit Intelligent Webforms

INTELLIGENCE IN ACTION

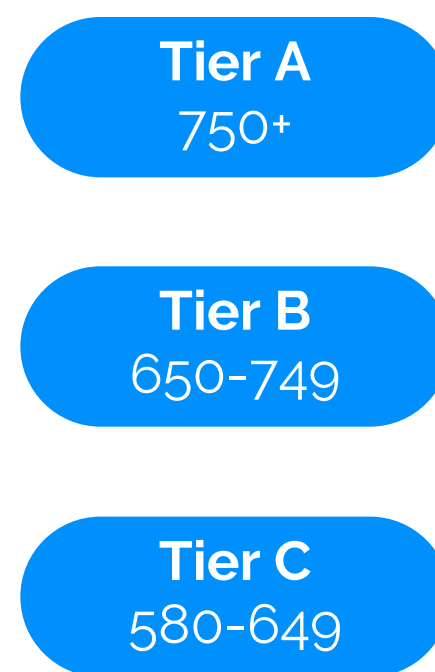
LEAD POOL



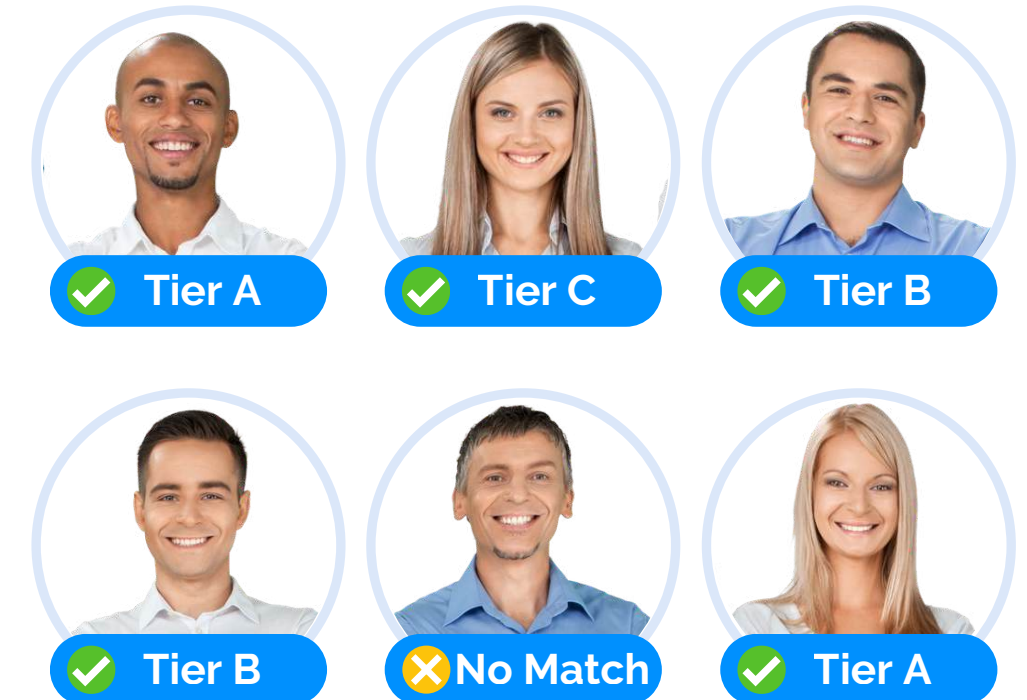
CREDIT WEBFORM



LOAN TIERS



INTELLIGENCE APPLIED



# Credit Intelligent Webforms

INTELLIGENCE BASED MESSAGING

Success!

You are pre-qualified for our Gold Card! Schedule a meeting with my [Calendar](#) or use the button below to apply now!

Apply Now



Thank you for your submission!

We have received your request and are processing it now. Please use my [Calendar](#) or use the button below to schedule a meeting.

Schedule Meeting

# *Applicant Facing*

W E B F O R M S

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***iSoftpull***

# ***iSoftpull** Applicant Facing Webforms Increase Revenue*



**300%** increase in website conversions

Because soft pulls require minimal personal information and do not impact the consumer's credit, consumers are 300% more likely to complete an online pre-qual as opposed to a traditional online loan applications.

**5X** more likely to close on loans

By pre-qualifying clients at the beginning of the sales cycle, clients have greater confidence they will get approved for the loan, and are in turn 5x more likely to formally apply for financing and close on the loan.

**10X** deals closed

Because more people are applying for loan products and sales efforts can be exclusively invested in pursuing qualified applicants, 10x more deals will be closed.

# Pre-Qual Webform

CUSTOMIZED WEBFORMS

**Get Pre-Qualified!**

Instantly check if you pre-qualify for a loan.  
Checking will **not** impact your credit.

First Name \*  Last Name \*

Address \*

City \*  State \*  Zip \*

I give consent to pull my credit for pre-qualification purposes.

**Get Pre-Qualified!**

## Name & Address Only

Less information equals greater conversions

## Compliant

Automatically captures consumer consent

## Customizable Text

Customize form headings, subheadings, and button copy.

## Mobile Friendly

Works on all devices

## Customizable Fields

Add employment, referral source, etc.

***With iSoftpull's Credit Intelligent Webforms, businesses of all sizes can benefit from the pre-qual webforms utilized by major players in the lending space.***



*Pre-Qual Example*



*Pre-Qual Example*



*Pre-Qual Example*



**View examples of major brands currently using applicant facing credit webforms**

# Applicant Facing Forms

HOW IT WORKS



## CREATE *intelligence*

Set your custom score limits for each of your finance offerings. Score limits are based off of FICO® or Vantage Scores-- any score model or version (e.g. mortgage, auto, bankcard, etc)



## CONFIGURE *webform*

Customize your form fields, messaging, and assign form to employees.



## LAUNCH *forms*

iSoftpull's Form builder generates an embed code so you can easily add it to your website. Alternatively, use the link generated as a standalone webpage containing your form.



## DRIVE *web traffic*

Once your form(s) has been launched you can utilize different methods to drive traffic to your form, whether it be through social media, paid ads, or organic web traffic, and watch your revenue grow!

# Form Functionality

POST LEAD SUBMISSION



## PULL *credit*

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*Automatically pull credit when lead submits, this enables you to take advantage of the redirects and intelligence benefits.*



## CAPTURE *consent only*

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*When your lead submits it will capture the requisite written instructions from the applicant, however you can pull credit later in iSoftpull.*

# Response Types

M E S S A G I N G   P O S T   L E A D   S U B M I S S I O N



## NATIVE *messaging*

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*Instantly displays your unique messaging relevant to your client's credit score.*

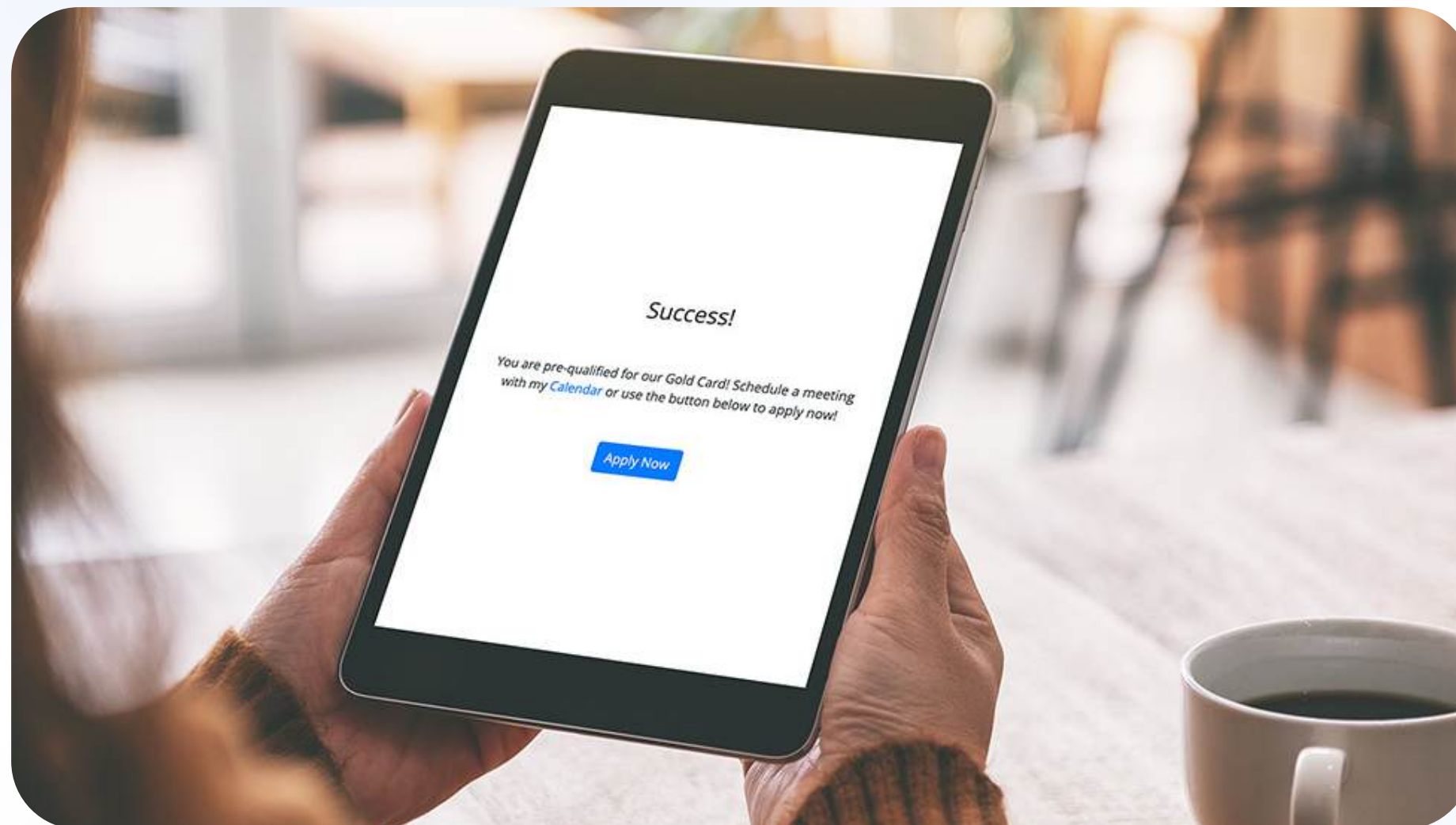


## URL *redirect*

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*Instantly redirects your lead to URL (e.g. thank you page, product page, full credit application, etc.) based on your client's credit score.*

## Native Messaging



### ➔ Relevant Messaging

Customize your messages to your clients based on their credit score. For example, inform them they are pre-qualified for "loan offer A" at 5.9% and instruct them on next steps.

### ➔ Full Application Link

Include a hyperlink to a full loan application to funnel your leads to the next step in your sales process.

### ➔ User Profile Link

Include a link to your personal biography on your website, LinkedIn page or other relevant employee URL.

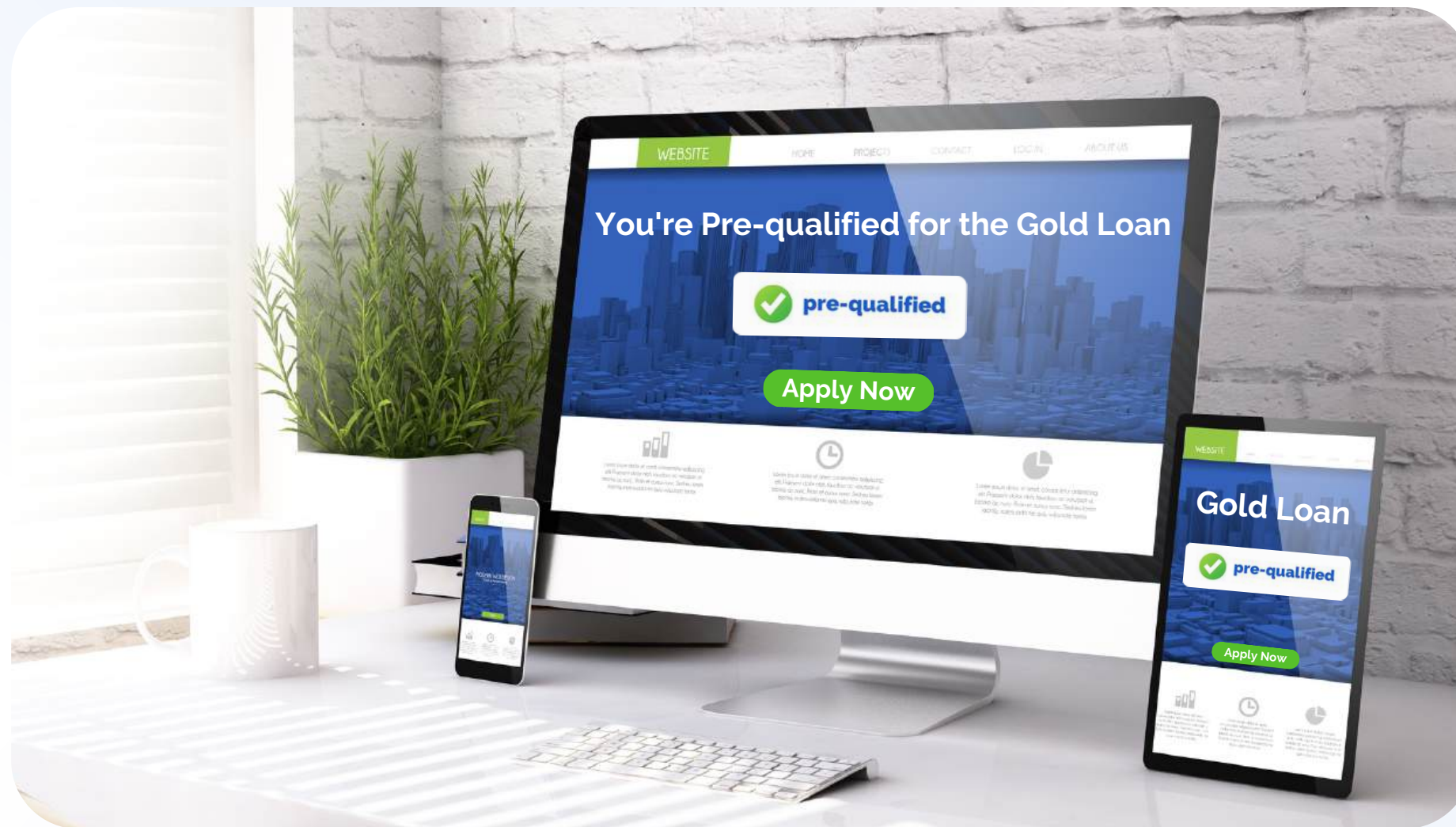
### ➔ Calendar Link

Include a link to your calendar booking page for expedited service to ensure only pre-qualified applicants get on your calendar.

### ➔ Call to Action Button

Link applicants to the next stage by displaying a prominent button on your widget to ensure they complete the desired action.

# URL Redirect



## ➔ Instant Redirects

Once your lead has submitted the Credit Webform and our intelligence applies our instant redirect feature enables you to direct your customers to a particular URL based on their credit score. Here you can display custom messaging based on pre-qualification status.

## ➔ Product Page

Redirect applicants to a specific product page with rates and pricing based on their exact FICO® Score. Here you can include a full plan application or a thank you page tailored to the applicant's pre-qualification status.

## ➔ Conversion Tracking

By setting up URL redirects associated to intelligence, easily track your conversions with Google Tag Manager and Facebook Pixel to optimize and track the efficiency of your marketing campaigns.

# *Employee Facing*

W E B F O R M S

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***iSoftpull***

# **iSoftpull** Employee Facing Webforms Optimize Your Sales Force



**300%** increase in conversions

Because soft pulls require minimal personal information and does not impact credit, consumers are 300% more likely to get pre-qualified with a phone rep than they would opposed to if it required them to provide sensitive information.

**5X** more likely to close on loans

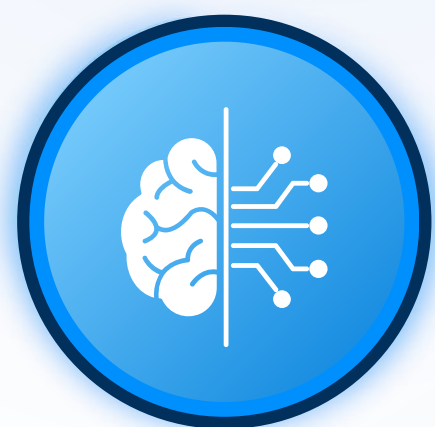
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**10X** deals closed

Because more people are applying for loan products and sales efforts can be exclusively invested in pursuing qualified applicants, 10x more deals will be closed on.

# Employee Facing Forms

HOW IT WORKS



## CREATE *intelligence*

Set your custom score limits for each of your finance offerings. Score limits are based off of FICO® or Vantage Scores-- any score model or version (e.g. mortgage, auto, bankcard, etc)



## CONFIGURE *webform*

Customize your form fields, messaging, and assign form to employees.



## LAUNCH *forms*

iSoftpull's Form builder generates an embed code so you can easily add it to your website or you can use the link generated to standalone webpage which contains your form.



## START *pre-qualifying*

Once your form(s) has been launched, your phone agents can start easily identifying the credit worthiness of their customer's instantly, without needing to login to iSoftpull!



# Employee Facing

CREDIT WEBFORMS SPECIALIZED FOR  
PHONE ROOMS & CALL CENTERS



## PHONE *rooms*

Providing your call agents with the ability to pre-qualify clients over the phone without having to expose agents to live credit data will enable your agents to close clients on the first call.

**Limit your business' exposure to risk by enabling employees of all levels to pre-qualify prospective borrowers.**

# Response Types

M E S S A G I N G   P O S T   L E A D   S U B M I S S I O N



## NATIVE *messaging*

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*Instantly display your custom messaging based on intelligence settings within the form and add hyperlinks to your calendar, hard pull link application, or a specific URL such as product or loan page.*



## URL *redirect*

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*In place of a native messaging, our URL redirect function enables you to direct call center employees to specific URLs based on your pre-defined credit intelligence.*

## ***Native Messaging & URL Redirect***

### ➤ Relevant Messaging

Customize your messages to your clients based on their credit score. For example, inform them they are pre-qualified for "loan offer A" at 5.9% and instruct them on next steps.

### ➤ Full Application Link

Include a hyperlink to a full loan application to funnel your leads to the next step in your sales process.

### ➤ Calendar Link

Include a link to your calendar booking page for expedited service to ensure only pre-qualified applicants get on your calendar.

### ➤ URL Redirect

Include a link to your calendar booking page for expedited service to ensure only pre-qualified applicants get on your calendar.



**Coach phone agents with appropriate messaging throughout call to help close more deals and provide better service.**

# iSoftpull pricing

Setup fee: \$250

- ✓ User Setup
- ✓ Software Configuration
- ✓ Training
- ✓ Website Optimization
- ✓ Onsite inspection mandated by the bureaus

Click [here](#)  
or scan to  
get started



### Start-up

**\$99/month**  
billed monthly  
+ \$4.84/Report & Vantage Score

Basic features for solopreneurs.

\*FICO scores are an additional \$1.50

1 users

1 forms

Pay Monthly | Pay Upfront **SAVE 20%**

Get Start-up

### Professional

**\$149/month**  
billed monthly  
+ \$4.59/Report & Vantage Score

Bring your team together & connect to all three bureaus.

\*FICO scores are an additional \$1.50

5 users

5 forms

Pay Monthly | Pay Upfront **SAVE 20%**

Get Professional

### Popular

### Small Business

**\$249/month**  
billed monthly  
+ \$4.34/Report & Vantage Score

Boost your customer acquisition with automation.

\*FICO scores are an additional \$1.50

10 users

10 forms

Pay Monthly | Pay Upfront **SAVE 20%**

Get Small Business

### Enterprise

**\$399/month**  
billed monthly  
+ \$3.84/Report & Vantage Score

Advanced features for those who need full customization.

\*FICO scores are an additional \$1.50

25 users

25 forms

Pay Monthly | Pay Upfront **SAVE 20%**

Get Enterprise

*Start growing your profits  
using iSoftpull today*

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*[click to get started](#)*