

Quick Reference Guide for Consulting Firms

December 18, 2007

The electronic selection of consultants (WBG eConsultant) is a secure web-based tool that supports current and prospective consulting firms doing business with the World Bank.

This guide will show you how to:

- Access the WBG eConsultant system
- Create and submit expressions of interest (EOIs)
- View and download Request for Proposal packages
- Submit requests for clarification
- Submit technical and financial proposals
- Get help with the WBG eConsultant system

Access to WBG eConsultant

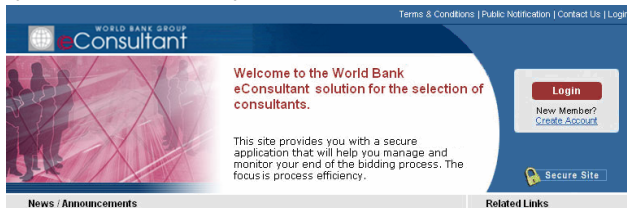
To access WBG eConsultant, you must have an internet connection and **Microsoft Internet Explorer version 6.0 or above**.

Type <http://www.worldbank.org/wbgeConsultant>

Registration

Consultants must register to use WBG eConsultant. The system currently supports only corporate services (firms). A corporate services account represents an individual looking for opportunities on behalf of their firm.

If you are a new user, you will need to create an account.



1. At the WBG eConsultant home page, click [Create Account](#).
2. Complete the information on the registration page and click [Submit](#).
3. A confirmation will be displayed and a new password will be sent to the email address you entered.
4. Obtain the password from your email and follow the instructions below to login.

Logging In

1. At the WBG eConsultant home page, click [Login](#).
2. Enter your User ID (your email address) and password.
3. Click [Sign In](#).

Note: If this is your first login, it is recommended to use the [Change Password](#) link on the Login page to change your temporary password. If you forgot your password, click [Forgot/Reset Password](#) to have a new one sent to you.

View Notifications and Express Interest

Notifications of consulting opportunities are published at www.worldbank.org, <http://www.devbusiness.com/>, and <http://www.dgmarket.com>. Anyone can view notifications at these sites. However, if you want to express interest in a notification, you must use the WBG eConsultant system.

The first step in expressing interest is to Subscribe to a notification. Subscribed notifications will be added to your personalized homepage.

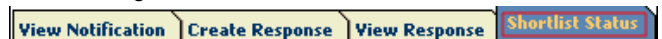
1. Log in to WBG eConsultant.
2. Click the **Public Notifications** tab.

Dashboard Selections Public Notifications Profile
3. Locate the notification that interests you and click its selection number.
4. Click [Subscribe to Notification](#) at the bottom of the page.
5. Scroll down and click [Express Interest](#) at the bottom of the page.
6. Answer all required qualification questions.
7. To upload your EOI document, click [Add Attachment](#).
8. Click [Browse...](#) to locate the file, then click [Open](#).
9. Click [Upload](#).

Note: To delete an attachment, select it and click [Delete](#).
10. Optionally, add any comments to the task team.
11. Click [Save Changes](#) to save as a draft, or click [Submit](#) to send the response to the task team.
12. The View Response Page confirms your response was submitted.

Note: Drafts cannot be viewed by Bank staff. Remember to submit your response before the deadline. After submitting, you may still make changes and resubmit at any time until the deadline.

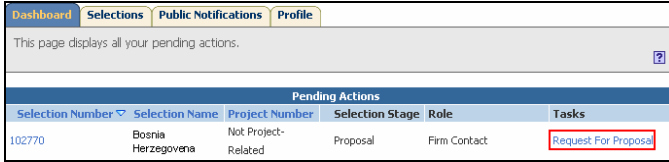
Once the deadline has passed, the Bank will review and rank all EOIs received. For selections based on Consultants Qualifications, one consulting firm will be selected to proceed. For selections based on evaluation of proposals, short-listed consultants will be invited to propose. You can check your status at any time by clicking on the **Shortlist Status** tab. You will also be notified by email when your status changes.



Note: Delivery of email notifications cannot be guaranteed. Consultants should check their status directly on WBG eConsultant.

View and Download Request for Proposal (RFP) packages

Once you are short-listed for a selection, you can access its Request for Proposal page.



1. From Dashboard, click [Request For Proposal](#)
2. Click the title of each document in the RFP package to view or download it.
3. After reading all RFP documents, if you intend to submit a proposal, click [Confirm to Propose](#).

You can now submit requests for clarification, submit proposals, or withdraw from the process.

Submit Requests for Clarification

1. Locate the section titled [Requests for Clarification](#).
2. Click [Add RFC Question](#).
3. Enter the subject and the question.
4. Click [Send](#).

Your question is now displayed in the Requests for Clarification area. The response from the Bank will also appear in this area. In addition, you will receive an email notification when a response is posted.

Submit Technical and Financial Proposals

1. To upload proposals, click the appropriate button: [Upload Technical Document](#) [Upload Financial Document](#)
2. Click [Browse...](#) to locate your file, then click [Open](#).
3. Click [Upload](#).

Note: To delete a document, click [Delete](#).

4. If required, enter the total cost amount without commas.
5. Click [Submit Proposal](#).
6. Click [OK](#) to confirm.

Proposals may be modified and resubmitted up until the deadline. Bank staff are unable to view proposals until after the proposal deadline.

Note: If financial proposals are requested, then both technical and financial proposal documents must be submitted. Submission of only one proposal document will be considered incomplete, and your submission will not be evaluated.

To withdraw your submission, scroll up to the confirmation section and click [Withdraw](#).

Evaluation, Negotiation and Award

After the proposal deadline, technical proposals will be evaluated. Any clarification requests will be posted on the **Request for Proposal** page, under **Proposal Clarification**.



To respond, click [New Subject](#) or [Add Attachment](#).

After evaluations are complete, the Team Leader will negotiate with the winning firm. You can view your status online at the top of the **Request for Proposal** page:



You will also receive an email confirming the status of your firm's proposal.

Edit Your Firm's Profile

1. To edit your profile, click the **Profile** tab. [Dashboard](#) [Selections](#) [Public Notifications](#) [Profile](#)
2. Click the corresponding [Update](#) link to modify:
 - Background
 - Financial Information
 - Diversity Information, or
 - Insurance Information (in USD currency)
3. Make the desired changes and click [Submit](#).

To add up to three areas of expertise, click [Add Expertise](#).

Click [Update](#) or [Delete](#) to modify or remove an entry.

To add a contact, click [Add Contact](#) and enter the details. Click next to the selections this contact will be involved in. Click [Submit](#). A password is sent to the contact's email.

To remove a contact, select the name [Remove Contact](#), then click [OK](#). At the warning, click [OK](#).

To update a contact, select the name [Update Contact](#), then click [Update Contact](#). Make the changes and click [Submit](#).

To change the primary contact, select the appropriate name and click [Make Primary Contact](#).

Get Help

- If you need help with WBG eConsultant, click [Help](#) on the top right corner of the screen.
- For further assistance, please send an email to wbgconsultant@worldbank.org.