



A DR GPT™ LABS VENTURE

The Event Planner's Guide to Choosing a Speaker and Speaking Agency

A practical framework for audience fit, speaking evidence and clear booking decisions.

For conference organizers, association leaders, corporate event planners and healthcare education teams. Use this guide to evaluate any speaker or agency, including Signal & Stage.

The principle

Choose the session your audience needs. Then test the evidence, clarify who does what, and put the agreed scope in writing.

Use the guide and scorecard together

Read the decision framework on pages 2 through 7. Use the event brief and review prompts on page 8. Record your evidence in the separate two-page comparison scorecard before selecting a finalist.

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Define success before choosing a name

A useful brief describes a real audience and one achievable learning outcome. It does not promise attendance, revenue or clinical results.

Write a decision statement

Working sentence

For [audience], this session should help participants [understand, compare or practice something specific], so they can [take an appropriate next step].

Example: For hospital department leaders new to AI procurement, the session should help participants compare evidence and identify questions to ask before approving a pilot.

Separate essentials from preferences

Essentials: Date, time zone, budget ceiling, language, required accessibility arrangements, format, and any organizational or accreditation rules. A strong score cannot override an unmet essential.

Preferences: Relevant examples, depth of discussion, interaction style, preparation approach and quality of evidence. Agree on their importance before reviewing candidates.

Give the speaker context

Specify roles, experience, expected audience size and familiarity with the topic. Explain why the subject matters now, where people disagree, and which examples or sensitive subjects should stay out of the session.

For healthcare education, state whether the session is educational, commercial or accredited. Ask your education team to confirm disclosure, content and accreditation requirements; a speaker's credentials alone do not establish credit eligibility.

Describe diversity with purpose

Consider whose expertise and lived experience the program needs. Look for perspectives that are relevant and substantive. Do not infer identity, language ability or willingness to tell a personal story from a photograph or biography.

Match the format to the work

Choose the format before comparing fees. A keynote, workshop and moderated conversation require different evidence and preparation.

Format	Best use	Clarify before booking
Keynote	Establish a shared perspective or frame an important decision.	Duration, audience level, examples, stage setup and whether Q&A is included.
Workshop	Practice a skill or apply ideas to a real problem.	Participant cap, exercises, materials, facilitators, accessibility and expected output.
Panel	Compare genuinely different perspectives.	Moderator, distinct roles, questions, speaking balance and preparation responsibilities.
Moderated conversation	Explore a person’s experience through focused questions.	Interviewer skill, boundaries, question plan and audience participation.

Treat virtual and hybrid as delivery conditions

Confirm time zones, platform access, captions, interpreters where required, technical rehearsal, camera and sound, audience interaction and a fallback for connection problems. Do not assume an in-person talk transfers unchanged to a screen.

Ask for a session outline

Request a working title, a short description and two or three specific takeaways. Ask what participants will do with the information and which parts can be adapted. For a workshop, request an example exercise rather than only a list of topics.

A useful distinction
“Understand AI” is broad. “Compare three questions to ask about the evidence behind an AI tool” is specific enough to evaluate. A proposed takeaway is an intention, not a promised result.

Look beyond the biography

Expertise and stage performance are separate questions. Review both against the audience and session you actually intend to book.

Relevant expertise: Ask what the person personally built, led, studied or experienced. Distinguish current roles from former roles, research from deployment, and an employer affiliation from an endorsement.

Current credentials: Verify material qualifications through the issuing organization or institution. Ask about commercial interests, evidence dates and the limits of the speaker's expertise.

Evidence type	What it can show	What it cannot establish alone
Full stage recording	Structure, pacing, transitions, explanation and audience interaction in context.	Fit for your audience or ability to deliver a different format.
Interview or podcast	Conversational clarity, responsiveness and depth on the questions asked.	A sustained keynote, facilitation skill or independent session design.
Short reel or clip	A first impression and examples selected by the speaker or agency.	Consistency across a full session or how editing shaped the impression.

Watch with a question in mind

Ask for a recent sample close to your intended format. Note the date, audience, length and whether it was edited. Record timestamps supporting your judgment. If no suitable sample is available, mark it "Not yet verified" and request one.

Check testimonials and references

Ask who provided the statement, for which event and when. With permission, contact a planner from a comparable audience. Ask about preparation, relevance, reliability, agreed changes and whether they would book the speaker again. Do not treat an unattributed quote or a logo strip as a reference.

Service should be clear, not assumed

The agency's contribution is more than a name on a shortlist. Ask how its process reduces uncertainty and who is accountable for each step.

Communication: Who is your named contact? Who handles changes or an urgent issue? Agree response expectations rather than assume a guaranteed turnaround.

Preparation: Who collects the brief, arranges any planning call, confirms the outline and coordinates technical requirements? Which tasks are included, optional or handled directly by the speaker?

Booking responsibility: Who is the contracting party? Who invoices, collects funds and manages travel? Does the agency have authority to make the proposed arrangement with this speaker?

The advantage of an active speaker at the helm

Signal & Stage is led by Harvey Castro, MD, an active keynote speaker. That firsthand perspective can help keep attention on practical stage questions: how a brief becomes a session, how examples fit a room, and what a speaker needs from a planner.

The advantage is a practitioner's perspective, not a promise that Harvey will personally curate, coach, rehearse or attend every engagement. Ask who will support your event and confirm their responsibilities in writing.

What Signal & Stage currently describes

The public site offers speaker profiles, available speaking samples, comparison of up to three candidates, and an inquiry process to discuss fit, availability, scope and terms. An inquiry does not reserve a date or establish representation.¹

Rehearsals, travel coordination, promotional posts, materials, on-site support, substitutions and post-event analysis must be discussed and expressly agreed. This guide's evaluation questions are not a list of included services.

¹Signal & Stage public planning and inquiry information, checked September 27, 2026.
<https://www.harveycastromd.com/signal-and-stage>

Price the whole engagement

Ask each candidate or agency for a written proposal based on the same brief.

Compare the total proposed cost and what it includes, not only the headline fee.

Speaking scope: Session format and length, preparation calls, customization, materials, workshops, additional appearances and any follow-up work.

Expenses and payment: Travel class, hotel, ground transport, meals, visas, taxes, currency, payment schedule, expense caps and whether estimates are fixed or subject to approval.

Production costs: AV, platform support, captioning, interpreters, accessible materials and any rehearsal requirements. Identify which party supplies and pays for each item.

Questions to resolve in the agreement

Topic	Ask for a clear answer
Cancellation and postponement	What triggers a fee, refund, credit or rescheduling option? How are illness, travel disruption and circumstances outside either party's control handled?
Substitution	Is a replacement permitted? Who approves it, and what happens if the alternative is unsuitable?
Accessibility and participation	Which arrangements are essential, who provides them, and when will they be confirmed?
Recording and reuse	Is capture allowed? Clarify streaming, editing, excerpts, audience, channels, duration, ownership and any additional fee.
Promotional permissions	Which names, images, logos, biographies, clips and quotes may be used, where, and for how long? Who approves changes?

Do not assume a standard penalty, refund rule, recording license or substitute-speaker guarantee. Have the authorized contracting parties agree the terms; involve procurement or legal counsel when appropriate.

Request approved assets and a usable brief

An accurate event page and a well-prepared speaker start with approved materials, clear ownership and realistic deadlines.

Request an event marketing pack

Biography and introduction: An approved short biography, current role and credentials, pronunciation guidance, and a stage introduction suited to the session.

Headshot: A current, approved, high-resolution image with credit requirements and permitted crops or edits.

Session description: Approved title, audience, format and intended takeaways. Keep learning outcomes separate from claims about business or clinical results.

Promotional clip: If available, confirm file format, captions, duration, permitted channels and editing rights. Do not assume a reel can be reused in advertising.

Ask directly about speaker promotion

Use these three options

Is promotion by the speaker included, optional at an agreed scope, or unavailable? If included or added, specify the channel, number and timing of posts, approved copy, links, review process and any fee.

An approved headshot does not imply a social-media endorsement. Speaker posts do not guarantee registrations, reach or attendance. Confirm permissions before announcing the speaker or using employer and client logos.

Assign owners and due dates

Use one shared checklist for the brief, asset approval, session outline, travel, access needs, AV and final run of show. Confirm who receives changes and who gives final approval. For healthcare examples, use information you have permission to share and exclude identifiable patient information unless specifically authorized.

Request a final logistics check appropriate to the format. A technical rehearsal or content review is a service to agree, not an automatic entitlement.

Brief, compare, then learn

A compact event brief

Include	Make it specific
Audience and objective	Roles, subject familiarity, size and one intended learning outcome.
Session and logistics	Date, time zone, location/platform, format, duration and interaction.
Context and boundaries	Theme, organizational priorities, sensitive subjects and permitted examples.
Scope and approvals	Budget, preparation, access needs, assets, recording rights, owners and deadlines.

Use the scorecard before choosing

Compare up to three candidates using the same evidence standards. Confirm essentials separately. Rate only what you have enough evidence to judge, and record “Not yet verified” otherwise. Resolve the most important unanswered questions before committing.

Review after the event

Ask participants what was relevant, which idea they can use, what remained unclear and whether they could participate accessibly. Debrief with the planner and speaker about delivery and agreed scope. Distinguish satisfaction and reported learning from demonstrated behavior change or business results.

Continue with the existing planning worksheet² and the AI speaker guide³. This guide adds an agency and evidence review; it does not replace a written event agreement.

Need help building your speaker shortlist?

Explore Signal & Stage and tell us about your audience:

<https://www.harveycastromd.com/signal-and-stage>



²Existing planning worksheet. <https://www.harveycastromd.com/signal-stage-planning-guide>

³Existing AI speaker guide. <https://www.harveycastromd.com/signal-stage-ai-speakers>