



Complete HVAC Co.

LEAD APPOINTMENT REPORT

Full Name: Mark Smith

Current Title: Director of Facilities

Location:

Any City ST 12345

Email:

mark@completehvacgroup.com

Phone:

555-456-7890

Facility Size:

420,000 sq. ft. multi-tenant office complex

Appointment Details

Qualifier	Question: Where are the units located — rooftop, mechanical room, or distributed throughout the building? Answer: They're all rooftop units. Access is through the north stairwell, and the roof hatch is easy to get to.
Summary	Mark oversees a large Class-A office complex with aging rooftop units and mixed-manufacturer equipment. Several RTUs are nearing end-of-life, and intermittent cooling issues during peak demand, combined with a short-staffed maintenance team, have prompted him to explore supplemental HVAC support. He requested a meeting to discuss diagnostics, preventive maintenance, phased equipment replacement, and ongoing service coverage.
Logistic Details	• Date: July 12, 20xx • Time: 9:30 AM EST • Location: xxxxx Grand Rapids, MI • Notes: Morning appointments preferred. Mark asked for a calendar invite