



LEAD APPOINTMENT REPORT

Client – ABC Commercial HVAC

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

Location: [REDACTED] Grand Rapids, MI

Contact: Mark [REDACTED], Director of Facilities

Phone: [REDACTED]-[REDACTED]-[REDACTED] mobile

Email: mark@[REDACTED].com

Campaign Custom Qualifier:

- 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 approaching end-of-life, and the building has experienced intermittent cooling issues during peak load days. Their in-house maintenance team is currently short-staffed, and Mark is exploring supplemental HVAC support for diagnostics, seasonal maintenance, and potential phased replacement planning.

He requested a meeting to review current system performance, discuss service coverage options, and evaluate whether our team can provide ongoing support during their staffing gap.

Appointment Details:

- **Date:** July 12, 2026
- **Time:** 9:30 AM EST
- **Location:** [REDACTED] Grand Rapids, MI
- **Notes:** Morning appointments preferred. Mark asked for a calendar invite.