Assessing the user and the staircase

Stannah

Why this is so important

Next to making friends with the customer and asking for the order, doing a professional job of assessing the user and the staircase is one of the key steps in selling a stairlift.

This step is the one most likely to leave you with a satisfied customer (a good thing in itself, but also a good source of new sales leads), and to allow your business to make the sale profitably. Nothing eats into profits (or sales commission!) faster than having to repeat the installation because the salesperson specified the wrong product, or failed to notice something about the staircase that had to be changed.

Benefits of a good assessment include:

> It gives you all the facts to make a good sale. You can choose the best product to suit the users' needs, and refer to the reasons why when making your presentation. This will make **the** stairlift into **their** stairlift, which helps you to close the sale.

> You will appear more professional. Many stairlift salespeople skip this stage or fail to do it thoroughly, so by simply taking the time to, for instance, measure the spine-to-knees of the customer, you give them reasons to buy from you. If you are working with a third party, such as an occupational or physical therapist, they are more likely to refer business to you, as it reflects well on them.

> Your installers will have an easier job. If everything has been prepared properly, the installation will go smoothly. This pleases the customer (happy customer = referral leads) and keeps down the cost of the installation, thus making your business more profitable and hence more likely to survive in a competitive market.

Assessing the User

As stated before, a successful installation is bringing together two vital sources of information, (1) the customer, (2) the site. If this is done well it greatly reduces the likelihood of costly errors and unnecessary inconvenience to the customer.

This is an important aspect of the overall assessment process; by definition it highlights customers' weaknesses and shortcomings. Equally, it will highlight what they can do, i.e. the positive. It is therefore essential to be tactful and empathetic when discussing with customers. Most customers, however, accept their limitations and will openly discuss them, so don't be afraid to ask questions but do so sensitively.

CUSTOMER DETERIORATION

The assessment as to the suitability of a stairlift in a given situation can only be undertaken based on the best available knowledge and this can only be given at the time of the assessment. One should not look to future possible improvements in a customer's condition to justify the sale of a stairlift. The assumption should be that the customer's condition will not improve. Where professional advice is available (Occupational or Physical Therapists), then seek that advice and be guided by their assessment of the customer's current and future condition.

We always assume that a customer's condition is more likely to remain the same or deteriorate rather than improve.

Never propose a situation based on hoped-for improvement in their condition.

OBSERVING THE CUSTOMER

Carefully watching the user can give you helpful information about their mobility. How quickly do they walk? Do they limp? Do they use a walking aid, or hold onto furniture? Is there a walking stick or cane nearby? Do they stop to catch their breath after moving? Have grab bars been fitted in the home? Noting things like these can help you more quickly form a picture of their situation, and give you a basis to judge how they describe themselves.

Assessing the User

MEASURING THE USER
If possible, always measure the customer. Not only does it avoid unnecessary mistakes and unwanted extra costs, but it also helps break down sales barriers. Ensure these measurements are accurately recorded on quotation form and drawing.

The two key measurements to be taken are:-

> Customer spine to knees/toes, (B&C) - pg 6 i.e. the greatest protrusion of the customer into the staircase. This measurement is crucial in determining whether the staircase is wide enough.

> Customer's seat to head. (A) - pg 6. This will determine that there is sufficient space to clear any bulkheads which could clash with the customer's head during travel up the stairs.

METHOD: Seat the customer with their back against a wall, where possible. This will give an accurate measurement. The use of a stool or armless chair is ideal.

N.B. Note the customer's normal posture and do not allow them to adopt an unnatural position, which could not be maintained.

SPINE TO KNEE (B) Should always be measured and used if there is any doubt that the staircase is wide enough

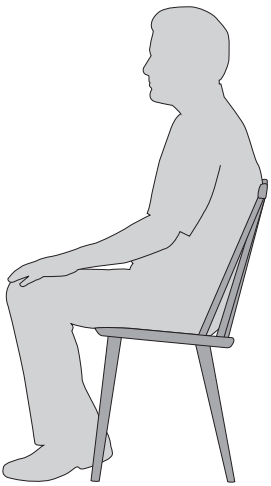
SPINE TO TOE (C) To be taken when spine to toe dimension when the toes protrude further than the knees, with the knee bent back as far as possible.

SEAT TO HEAD (A) Measure from the seat of the chair to the customer's head, ensuring that they are sitting fully 'upright'. Although this is not a normal sitting position, it will ensure the clearance is good.

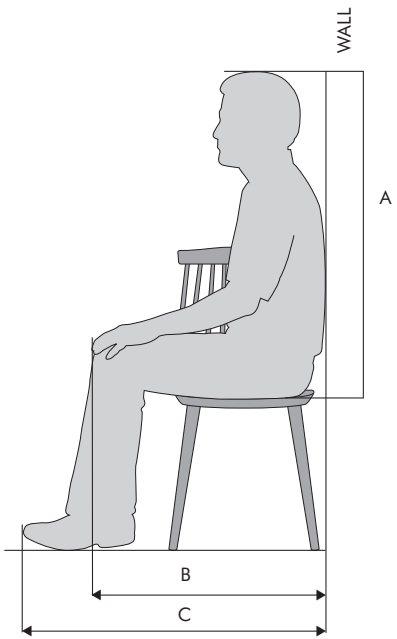
Assessing the User

MEASURING THE USER

✗ **INCORRECT METHOD**



✓ **CORRECT METHOD**



EXAMPLES

A = 800

B = 590

C = 600

Assessing the User

NOTE: When asking the customer to sit in a dining room type chair, note the following points which will provide further clues as to the customer's ability/disability.

> How do they get up from their current chair?

> Is their current chair raised suggesting a higher seat height is more comfortable?

> Can the customer walk unaided to the dining chair? if not, then be aware. Get them to walk to the chair rather than you bringing the chair to them.

> What walking aids do they use? How will that fit in with your specification?

> Do they have good days/bad days? What type of day is today?

> Ask how they manage the stairs at present?

Get down to customers level i.e.; on your knees and mention that you may physically touch the customer before you do so in the process of measuring.

WEIGHT CONVERSION CHART

Kilograms (kg)	Pounds (lb.)	Stones
10	22	1.6
20	44	3.1
30	66	4.7
40	88	6.3
50	110	7.9
60	132	9.4
70	154	11.0
80	176	12.6
90	198	14.1
100	220	15.7
110	243	17.4
120	265	18.9
130	287	20.5
140	309	22.1
150	331	23.6

Assessing the User

WHEELCHAIR TRANSFER HEIGHTS

When assessing the staircase for a stairlift always try to estimate the expected transfer height.

> Test the customer's ability to cope with a high transfer.

> It may be necessary to use a powered swivel seat to overcome a high transfer at first floor.

> Attempt to simulate the seat to floor height by building up a chair (use cushions, telephone directories) to the required height and get user to try this height.

> Explain to the customer exactly what you're doing and ensure the customer takes care when attempting the exercise. Do not leave the customer alone when in this situation. Assist the customer in getting in and out of chair.

> Note the area into which the customer will transfer.

> Will the customer cope with a sideways transfer in a narrow hallway? (If not, specify the two-way powered swivel option.)

> Is there adequate space for a wheelchair transfer (either sideways or forwards)?

> Is there adequate space for carers to perform an aided transfer?

> Is there adequate space for nose over toes transfer?

ASSESSING THE USER

Double Amputees: It is difficult to make an absolute ruling in the case of double amputees, but serious considerations should be given whether a stairlift is an appropriate solution at all. Special attention needs to be given to seat/floor height.

Wherever possible, the customer should try out a stairlift before proceeding with the purchase. Copy drawings of the installation detailing transfer height should be sent to interested professionals for their approval.

Assessing the User

Wheelchairs: Need to understand how a customer would transfer from wheelchair to stairlift. Front on transfers are easier with a stairlift with the customer approaching from the front and pivoting 180° prior to sitting down.
(Note two way swivel benefits if applicable.)

Side on transfers (sometimes using a banana board / or sliding board) are more difficult due to lack of side on space, variance in seat height between stairlift and wheelchair, and the intrusion of the stairlift arm and seat belt holder into the transfer space. **(Note consider SL chairs with interlink bar removed.)**

Hoists: Generally stairlifts and hoists make poor bedfellows so be wary. Usually a customer requiring a hoist would be better served with a lift or elevator. Hoist slings usually cause slipping of the customer in the chair, causing knee clashes. If using a stairlift, always get lift as far away from stairs as possible for both ceiling and "A" frame floor hoists. Use curved lift with horizontal run off and overrun where possible even on straight staircases.

Quadriplegia: Never use a stairlift in this case – a through floor lift or elevator is the more appropriate solution.

Epilepsy: Be aware of epilepsy but if this is drug controlled, or the customer gets advanced warning of an attack (some customers can know 2-3 days in advance of an imminent fit) then a stairlift is a satisfactory solution.

Motor Neurone Disease: Can result in very rapid customer deterioration and appropriateness of the stairlift needs to be discussed as a wheelchair/ hoist could well become required.

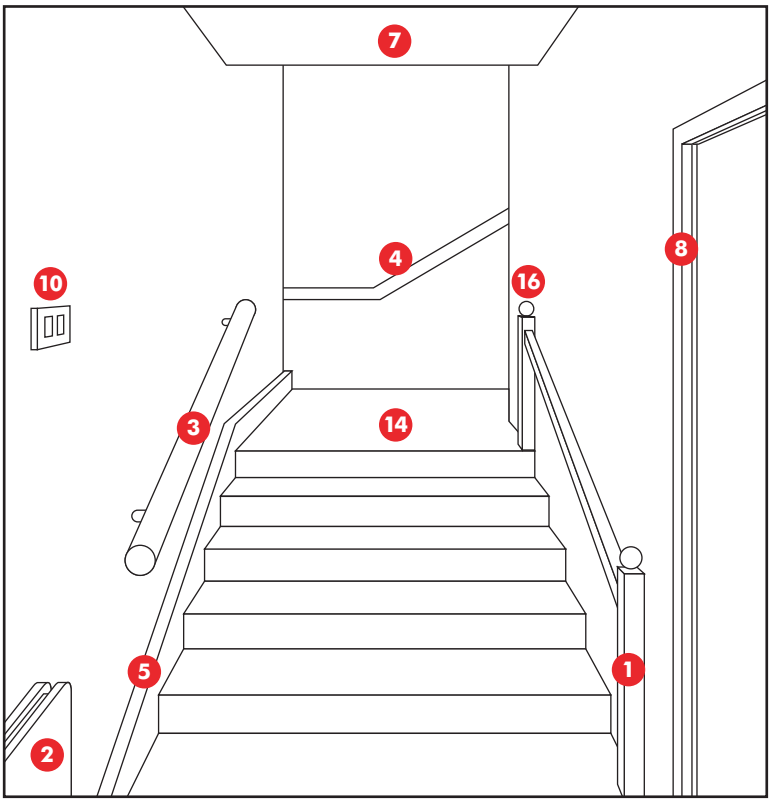
Strokes: Be aware of which side is affected for positioning of controls and for getting on/off lift especially at top of stairs.

Multiple Sclerosis: This condition ranges in extremes of the extent of the illness. In some of the more extreme cases, a stairlift can often be inappropriate. Occupational/Physical Therapists often dislike stairlifts for MS patients.

Curvature of the Spine: Be cautious on spine to knees measurement as dependant on height of the seat back, this can push knees out causing clearance problems.

Assessing the User

UNDERSTANDING STAIRCASE AND DIMENSION TERMINOLOGY



1. Newel Post
2. Radiator, Heater, Meter, etc.
3. Handrail, Balustrade
4. Dado Rail
5. Skirting, Stringers
6. Windowsill
7. Bulkhead, Beams
8. Doorway, Architrave
9. Pipes
10. Switches, Wall Light etc.
11. Stair Riser
12. Stair Going
13. Stair Nosing
14. Quarter Landing
15. Winder
16. Newel Cap

Assessing the User

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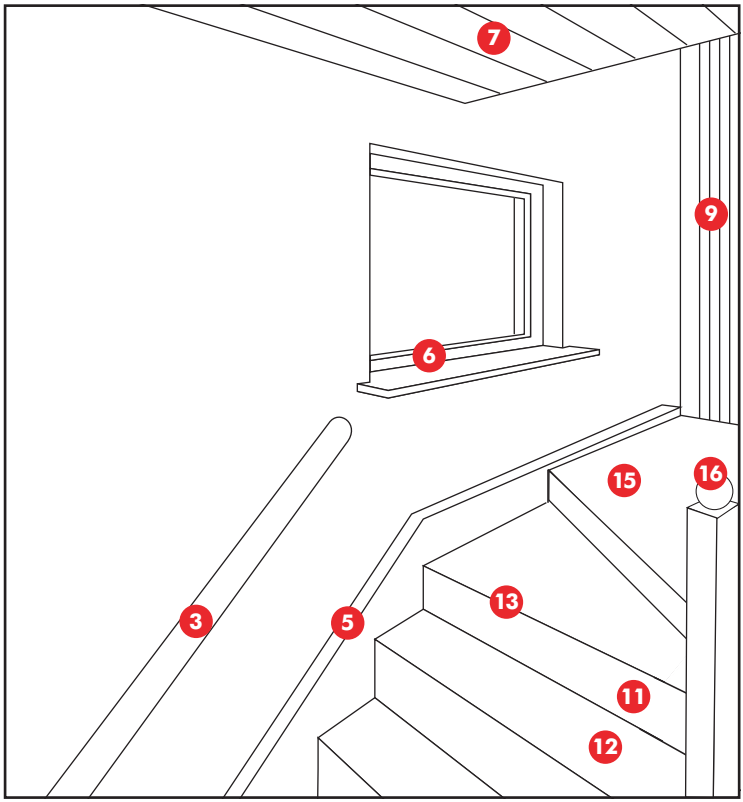

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Assessing the Staircase

ASSESS THE STAIRCASE IN STAGES

A good approach is to walk up and down the stairs briefly to see which side of the stairs would most likely be best to put the stairlift. Often this is obvious - only one side will work. Assess the staircase in more detail, possibly into three parts - the bottom landing, the travel up the stairs, and the top landing.

THE BOTTOM LANDING

More problems arise at the bottom landing than anywhere else, so pay particular attention here. The key is to make sure that the stairlift will be safe and usable- sometimes more difficult to achieve than it at first appears.

Chair position: A minimum of 100mm (3.9″) is needed between the downside armrest and any obstruction at the bottom of the stairs. This means that you will need a space about 715mm (28.1″) square in which to park the chair. In addition the user will need room to get in and out of the seat - an minimum of 300mm (12″) in front of the seat, or enough room for a wheelchair transfer.

Placing a kitchen chair or small dining room chair in the bottom park position often helps both you and the user to understand the space and its restrictions.

Should it not prove possible to leave the required 70mm clearance, then:

> Stop the stairlift far enough up the rail to ensure that sufficient space is possible.

> Ensure that the risk to the customer is fully explained and detailed in the quotation, paying particular attention to the seat to floor transfer height, which may turn out to be unacceptably high. Note that the footrest height should not to exceed 170mm (7″).

> Mount the chair on the highest carriage position (straight stairlift only) to reduce arm protrusion at base but be aware of any impact at the upside and also footrest height.

If there isn't room in front of the chair you should specify a Solus or Sofia chair with a two-way powered swivel. Note that you should allow an extra 100mm (4″) for the armrest to swivel away from the stairs.

Assessing the Staircase

Tripping hazards: A rail should not be left in situ where a tripping hazard may result. Where it is unavoidable, a guardrail or similar obstruction reaching to hip height of the user should be used. Use of hinged rails at the bottom (stair) of the staircase is the accepted solution.

Hinged rails:

> **For single enty properties never place a rail where it will block an entry door. Never place an unhinged rail in front of an entry door. Someone may need to get in or out in a hurry one day - don't be the person who stopped them. One alternative door isn't enough - what if the fire's between the user and that door?**

> A hinged rail needs room to swing up—allow a minimum of 850mm 29" from the first riser. Check that the rail when folded up will not block light switches etc.

> Note that a hinged rail cannot be placed at the top of the stairs.

Starting on the first step: Customers sometimes suggest this instead of having a having a hinged rail, but it is rarely a workable solution—the user would have to climb past the chair, turn around in a confined space and then swivel the seat; all potentially dangerous moves. Footrest will be closer to second step height.

Starting on winders (pie / kite-shaped stairs): Stairlifts should never finish or start on winders. It is not a safe solution. It is possible to finish on an angled last riser i.e. angled landing – if in doubt get a drawing done to establish footrest position.

All actions must be taken to minimise the intrusion of the stairlift particularly where winders are involved. The customer needs to be aware of the available space once the stairlift is installed. A drawing of the installation should be sent to the customer in this instance. Consideration should be given to possibility of an inside bend stairlift to travel over the winders, leaving the widest part of the stairs for other stair users.

Staircase construction: Note the staircase construction eg: wood, metal, concrete etc. Metal staircases require the gauge of the metal measuring to determine the correct size of bolts to be used. It's important that there is access beneath a metal staircase to ensure access to do up the nuts.

Furniture: The customer needs to arrange to have large furniture moved before installation. Installers should not be expected to move furniture. Consider the cost/insurance implications of moving an antique grandfather clock off the staircase to be told later it no longer works. Whose fault?

Assessing the Staircase

TRAVELLING UP THE STAIRS

Having assessed the bottom landing, walk slowly up the stairs looking for anything that could affect the stairlift installation.

Handrails: Generally, the stairlift should be placed as close to the wall on the side of travel as possible, to maximise the clear space available for the customer (knee/toe clearances) and also for other users of the staircase. The ideal arrangement is to have a handrail opposite the stairlift.

> Spiked-in handrails will need to be moved by a sub-contractor as this inevitably means plaster work or fitting of backboard/cover board.

> Always leave handrails on site unless specifically agreed and noted in writing on the quotation

Where possible, leave backboards in situ once handrail removed - this reduces the damage to decoration.

> Be aware of handrails on the opposite side of the stairs to the stairlift and the potential of the customer hitting the handrail with their knees. On a curved survey, detail that handrail as you would a dado rail or similar. If in doubt allow for a minimum call out charge for sub contractor to revisit to raise handrail.

Intermediate doors: A rail is not permitted to run in front of an intermediate doorway. Suggested solutions are:

> Try to locate the rail on the opposite side of the stairs.

> Have the customer block off the doorway and make a note to that effect on the quotation form.

Bulkheads (low ceilings): The user's head must not touch the bulkhead when travelling on the stairlift seated centrally on the seat. If there is likely to be a clash, consider cutting back the bulkhead. Never assume that a bulkhead can be cut back without taking professional advice.

> Obtain a drawing from Rail Design to get the exact dimensions for altering the bulkhead.

> Copy of drawing to builder requesting a site visit and written quotation to you.

> Only if it is feasible do you quote your customer.

> Ensure that you agree with the builder and the customer the extent of making good.

Assessing the Staircase

Picture frames: If a picture frame protrudes more than 25mm (1″) beyond the skirting or stringer, it may be in the way of the chair. The stairlift can be placed further away from the wall, or the picture can be removed. Ask the customer to do this before the installation. If the case of a curved-rail stairlift, you can detail the picture as an obstruction so that the rail is designed to avoid it.

Window sills: Like a picture frame (see above), but with the added option that the sill can be trimmed back before installation. See 'Making changes' opposite.

Newel caps: Measure the newel cap and if it's wider than the newel post detail it on your summary.

Obstructions that could catch the toes: Think about where the user's toes will be as they travel up the stairs—could they catch under anything, such as the ceiling of the room they started in, or a protruding trim? If so, the gap below the obstruction should be filled to prevent their toes entering the danger zone. See 'Making changes' on page 16.

THE TOP LANDING

With an inclined finish and a swivel seat, the top landing is rarely a problem if there is enough room to swivel the chair. When using a curved-rail stairlift, always park the chair on the top landing if space allows. You'll need a minimum of 300mm (12″) for a horizontal finish, but make it longer if possible, to leave more room for people walking up and down the stairs.

A door across the top of the stairs: If the door opens onto the stairs it will need to be removed or re-hung to open onto the top landing. Try to place the stairlift on the same side as the door is hinged, so that the user can reach the door handle easily when they arrive upstairs. Unless the door is set at least 150mm (6″) back from the top nosing, the rail will need to be installed to enter the door opening, where it may be a tripping hazard - discuss this with the customer. The minimum workable door width is 711mm (28″) to allow the user to swivel at the top, but their knees will probably brush the door jamb as they swivel. If in doubt, get a feasibility drawing made.

A door near the top of the stairs: This is rarely a problem. The top of the 420 rail usually protrudes about 100mm (4″) past the top nosing, but this can be reduced to zero by the installer. A 260 usually finishes with zero top-rail overhang; detail the door on your survey if in doubt.

Assessing the Staircase

OTHER OBSTRUCTIONS

These include radiators, heating/cooling vents, gas or electricity meters, thermostats, alarm-system components (especially light beams and pressurepads under the carpet) and telephone sockets. Detail these in your survey, and indicate whether or not they are to be changed. For instance, write something like 'radiator to remain' or 'radiator to be removed'. The customer will include the changes in their overall impression of the solution you sold them, so make sure it's as good as the stairlift.

MAKING CHANGES

If a change has to be made before the stairlift can be installed, the key is communication. On the quotation describe what the change is, who is to make it, when it must be made by, and who will be paying. For instance, you could write 'Quotation includes repositioning of radiator by our subcontractor, before installation', or 'Customer to arrange for installation of a power outlet before installation'.

Be aware that making changes to a heating / cooling system may change the way it works, so take expert advice if in doubt. Be especially careful about hot objects near the stairlift - older people tend to have thinner skin and be more susceptible to burns.

Provide sub-contractors with a clear and detailed description, with a dimensioned drawing if necessary.

MAKING GOOD

Always be very specific about making good, with a written description detailing what will be done, and by whom. If you have a quotation from a subcontractor, make reference to it and retain a copy for your files.

Notes

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If you need extra information...

If you require any further guidance relating to any of the information within this document, please contact the Stannah Marketing Team:

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