



# ARTIFICIAL INTELLIGENCE RESOURCE PROGRAM

UAA BUSINESS ENTERPRISE INSTITUTE

## Discover the INFUSE Framework to Develop Effective AI Assistants

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The rise of AI has opened new frontiers for business advising, making it more efficient, insightful, and personalized. For SBDC advisors, a truly transformative opportunity is learning to develop AI assistants—like **GPTs** (OpenAI), **Gems** (Google), or **Projects** (Claude). These custom tools can serve your SBDC center and clients. However, creating effective, trustworthy, and helpful AI tools requires more than just technical know-how; it demands thoughtful design. This is where the **INFUSE framework** excels.

This paper will introduce SBDC advisors to the INFUSE framework, a comprehensive approach designed to enhance the creation of AI assistants. The framework consists of six key components:

- **I - Identity & Goal:** Establishing the purpose and objectives of the AI assistant to ensure it meets specific client needs.
- **N - Navigation Rules:** Defining how users interact with the AI to ensure intuitive and efficient navigation.
- **F - Flow & Personality:** Crafting the AI's conversational flow and personality to make interactions engaging and natural.
- **U - User Guidance:** Providing users with clear instructions and support to maximize the AI's utility.
- **S - Signals & Adaptation:** Enabling the AI to interpret user signals and adapt its responses accordingly.
- **E - End Instructions:** Concluding interactions effectively to ensure users achieve their goals.

By leveraging the INFUSE framework, you'll be empowered to design intelligent assistants that are not only technically proficient but also closely aligned with the unique needs of your SBDC clients, local markets, and evolving economic landscapes.

## **I – Identity & Goal: The Soul of Your SBDC Assistant**

The foundation of any successful AI assistant begins with its **Identity & Goal**. For an SBDC advisor, this step involves deep reflection on what problem the AI will solve for your clients. Is it a tool for initial client intake? A resource for market research? Or a guide for business plan development?

For example, your SBDC could create an AI assistant specifically for local startups. Should the assistant act as a marketing strategist, a regulatory compliance coach, or a business plan outline crafter? Each role demands a different voice, focus, and objective. A business plan assistant, for instance, should be designed to ask about a business's mission, market, and financials, while a marketing assistant should focus on customer segments and promotional channels.

### **Teaching Strategies:**

- **Use scenario mapping exercises** to define the "who" and "what" of your AI assistant. You might ask, "How can an AI help a restaurant owner in their first 90 days?" or "What questions does a new client typically have about starting a business?"
- **Lead discussions on niche specificity**, showing how a specialized AI (e.g., for tourism, construction, or indigenous-owned businesses) can be more effective for a specific client group than a generalist tool.
- **Introduce examples** such as an SBDC 'GPT' specialized in business planning or another 'GPT' developed by your center for market analysis to highlight the importance of tailored identities.

By anchoring the assistant's existence in a clearly articulated goal, you ensure the AI is purposeful—not generic.

## **N – Navigation Rules: Setting the Guardrails**

Once the AI knows who it is, it must know how to operate. **Navigation Rules** determine how the AI processes input, accesses data, and maintains contextual accuracy.

For your center, this could mean building an assistant that knows when to pull information from a local knowledge base (e.g., specific permits for your state), or how to respond differently when working with a manufacturer versus a service provider. These rules ensure the AI stays on track and provides relevant, accurate information.

### **Teaching Strategies:**

- **Run flowchart workshops** where you design how your AI should respond under different user conditions. For example, if a user asks about funding, the flowchart

could direct the AI to first ask about the business's stage and then offer relevant loan programs.

- **Teach principles for integrating knowledge files**, and demonstrate step-by-step reasoning using chain-of-thought prompting. This helps the AI understand and follow logical steps, mirroring the thought process of a human advisor.

The outcome is an AI with rules and logic that mirror real-world decision-making—a critical factor in small business advising.

### **F – Flow & Personality: Making It Human**

AI isn't just smart—it can feel personal, warm, even trustworthy. That's the domain of **Flow & Personality**. For SBDC advisors, shaping the tone and communication style of your AI allows you to build assistants that connect with advisors and clients.

For instance, a 'GPT' developed for first-time entrepreneurs might use plain language and encouragement, while a growth-stage assistant might be concise and tactical. This ensures the client feels understood and supported, regardless of their business stage.

#### **Teaching Strategies:**

- **Conduct prompt engineering labs** focused on adjusting the tone and vocabulary of your AI. For example, compare a formal, direct prompt to a friendly, encouraging one.
- **Align AI Tone with Brand Voice:** Use an AI to analyze the tone of your organization's website and marketing materials. This analysis can then be used to train your AI assistant to adopt a consistent brand voice.
- **Use role-play simulations** where you interact with different assistant personalities and give feedback. This helps you understand what feels natural and helpful versus what feels robotic or unapproachable.

Helping advisors imbue their assistants with personality ensures the AI becomes a trusted partner—not just a data machine.

### **U – User Guidance: Designing the Steps to Success**

A well-designed AI doesn't just wait for commands—it guides the user. This element teaches advisors how to script step-by-step support, turning the AI into a process facilitator.

Imagine a 'GPT' helping clients develop a marketing plan. It could:

1. Ask about the customer segment.

2. Suggest appropriate channels.
3. Recommend budget allocations.
4. Provide a sample 30-day campaign.

### Teaching Strategies:

- **Break down typical advisory workflows, frameworks or outlines** and translate them into AI steps. For example, the process of helping a client create a financial projection can be broken down into specific questions the AI can ask in a logical order.
- **Emphasize instructional sequencing**, including clarification prompts, feedback checkpoints, and action items. This ensures the user progresses through a task effectively.

By mastering user guidance, you empower your AI tools to actually get things done—not just chat.

### S – Signals & Adaptation: Building Responsiveness

An intelligent assistant is a responsive one. **Signals & Adaptation** focus on how the AI reads the user and adjusts its behavior. Whether through recognizing frustration, understanding vague inputs, or customizing suggestions over time, this element brings the assistant to life.

An SBDC-specific example would be an AI that, after a user provides a negative response, says something like, "It sounds like you're feeling stuck. Let's try a different approach."

### Teaching Strategies:

- **Teach basic sentiment analysis and contextual cues** (e.g., "I'm stuck" = frustration). This helps the AI respond empathetically and effectively.
- **Use this prompt** to draft the instructions for the AI Assistant: *"Write me a system prompt for an AI assistant that can detect when a user is stuck or confused using sentiment and intent analysis, and then provide a simpler or alternative explanation with examples until the user confirms understanding."*

Incorporating adaptive intelligence transforms your AI from a static tool into a learning partner—critical for helping clients at different business lifecycle stages.

### E – End Instructions: Ensuring Boundaries and Ethics

The final—but no less vital—step is setting the **End Instructions**, or boundaries. This ensures the AI remains safe, ethical, and aligned with its role.

For example, no SBDC 'GPT' should provide tax or legal advice. And an assistant used for financial projection modeling must be clear about its limits—flagging assumptions, reminding users it's not a CPA, a legal advisor, etc.

### **Teaching Strategies:**

- **Introduce ethical frameworks** (e.g., privacy, data security, scope of expertise). Discuss how to handle sensitive client information and what information the AI should never be allowed to handle.
- **Simulate boundary challenges**, such as when a user asks the AI something outside its domain. This helps you prepare for real-world scenarios and ensure your AI provides a safe and helpful response.
- **Teach advisors to hard-code reminders, disclaimers, and exit actions** into their assistants. This can be in the form of a note at the start of the AI assistant's interaction. This ensures that the user is always aware of the AI's limitations and knows when they should consult a human advisor.

As AI regulation grows and user trust becomes paramount, teaching advisors to code responsibility into their tools will be an essential practice.

### **Building the Future of Business Advising with INFUSE**

The INFUSE framework is more than just a model—it's a complete teaching approach for creating smart, intuitive, and ethical AI assistants. For SBDC advisors, mastering this approach can open new doors in how you support entrepreneurs, automate internal tools, or even expand your own service offerings. By focusing on Identity & Goal, Navigation Rules, Flow & Personality, User Guidance, Signals & Adaptation, and End Instructions, you can build assistants that not only answer questions—but also inspire action.

As AI continues to evolve, those trained in frameworks like INFUSE won't just keep up—they'll lead. And in the world of small business development, that leadership will translate into stronger outcomes, smarter tools, and more vibrant local economies. What kind of AI assistant do you think would be most helpful for your SBDC center?