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SMALL BUSINESS

How To Avoid Making The Wrong Tech Investment During A Downturn

By [Jason Bahnak](#), Forbes Councils Member.

for [Forbes Business Council](#) **COUNCIL POST** | Membership (fee-based)

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A few years back, we were sitting in a cramped boardroom, staring at each other across a whiteboard the size of a placemat. The market had just taken a nosedive, down 9% in one day. Calls were coming in fast. Revenue was stalling. Everyone was nervous.

We had a decision to make: start cutting or start doubling down.

We chose to double down. Not recklessly, but with intention. We leaned into what was already working. And we came out stronger.

That moment taught me something that still holds true today: In shaky markets, businesses often don't fail because they didn't innovate. They fail because they made the wrong moves under pressure.

Big tech changes are a big risk when things get unstable.

There's always some new tech promising to "change the game." Maybe it's a new CRM. Maybe it's an AI content tool. Or an automation suite designed to run your entire sales process while you sleep.

But here's what I've seen time and time again: Most large-scale tech overhauls take longer, cost more and disrupt more than anyone plans for.

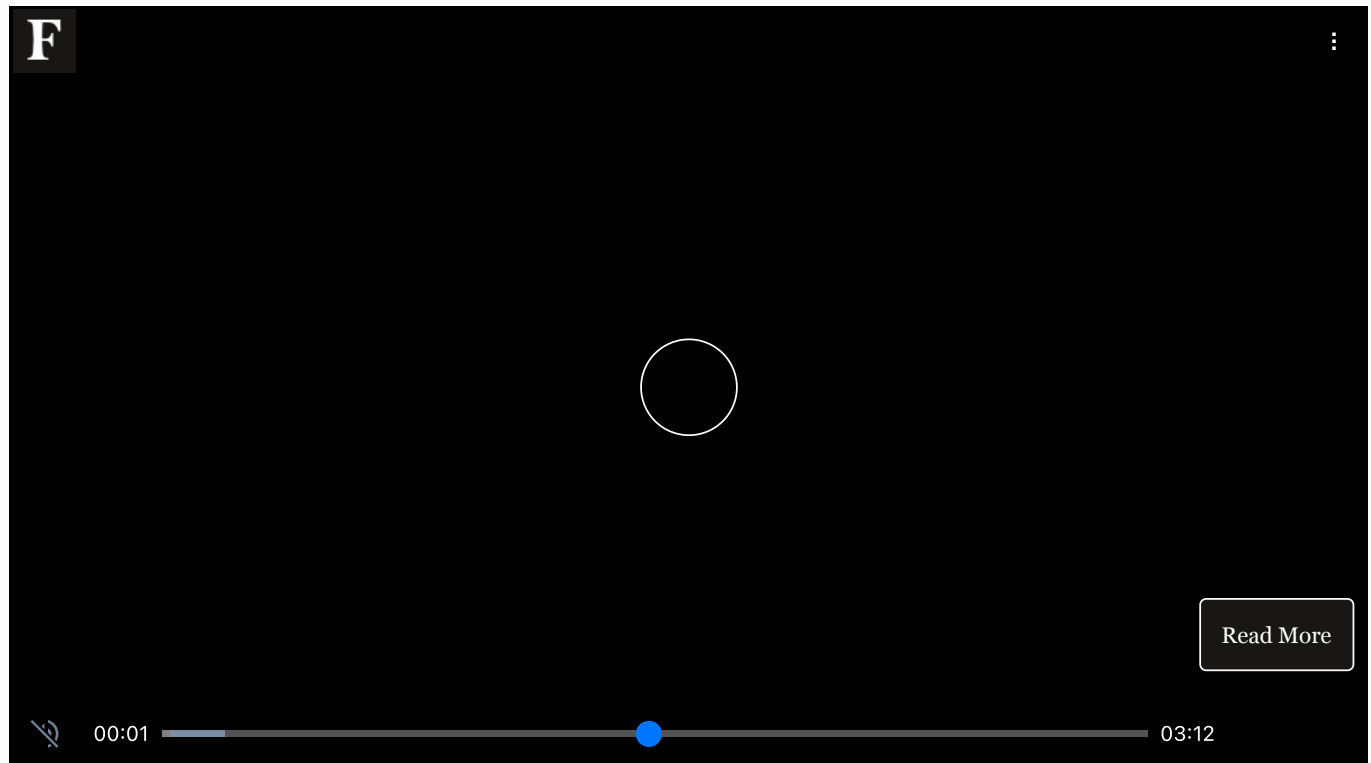
And the research backs it up: [70% of digital transformation efforts fail](#). In my experience, this typically isn't because the technology is flawed; instead, it's because the rollout is rushed, the goals are unclear and the teams on the ground aren't bought in. In uncertain markets, that kind of failure can break you.

Don't let 'upgrading' become a revenue trap.

Let's say you rip out your CRM in Q4. The new platform looks great on paper. But while your reps are learning it, deals slow down. The team gets frustrated. The pipeline backs up. And suddenly, you're not just investing in new software; you're bleeding momentum.

The real cost of change isn't always on the invoice. It's in the lost time, missed deals and morale dips that come with it. So before you roll out something new, ask yourself:

- Have companies like mine already proven this works?



- Will it improve the business immediately?
- Can we implement without losing weeks of productivity?

If the answer isn't a hard "yes" to all three, it's not the right time.

Get proof of usefulness before adopting new tools.

When AI content tools first hit the market, the buzz was deafening. Everyone said they were game-changing. We tested a few AI writers. One gave us a blog post that sounded like it was written by a toaster, and another cited fake stats.

So we held off. We watched the space for a while. Talked to peers. Took our time. Eventually, we saw enough success stories to give it a real shot. Now, we're creating more content in less time, and our quality hasn't dropped one bit.

Bottom line: New tools need more than potential; they need proof.

Revenue should drive decisions, not hype.

In uncertain markets, I recommend making every decision with one filter: "Does this help us generate or protect revenue?" That means ignoring trends if they don't convert. We track four channels consistently:

- Phone calls (still #1 for conversion)
- Inbound website traffic
- Outbound email
- LinkedIn/social (helpful, but not always a core driver)

Shift your strategy based on what's performing. If email slows, lean harder into calls. If search traffic picks up, reallocate the budget. That flexibility can give you an edge where chasing the "next big thing" doesn't.

Don't confuse popular with profitable.

When Twitter (now X) first exploded, everyone wanted in. I remember getting calls from executives asking how they could get on the platform, without a single question about what they would do once they got there.

Fast forward to today, and most of those companies have ghosted their profiles. No plan, no traction, no ROI. It's a reminder: Just because something's hot doesn't mean it's right for your business.

Build for scaling up or down.

Instead of blowing up your stack, focus on making your existing systems more flexible. Our company built a model for ramping up or down without starting from scratch:

- Cross-train your teams.
- Keep your recruiting engine on constantly.
- Evolve your sales playbooks weekly based on performance.

The tools you use should be there to support your people, not replace them. If the market shifts tomorrow, you don't want to be stuck reconfiguring everything; instead, you can adapt fast.

What should you do instead of making risky tech moves?

Here's what I recommend when things feel unstable:

- 1. Double down on what's working.** Audit your top-performing channels. Put more energy there.
- 2. Cut what isn't producing.** If something's not earning its spot in the budget, it's gone. Simple.

3. Adopt tech that's proven, not just promising. Ask who else is using it. Look at their results. Don't go first just to go first.

4. Outsource what doesn't drive revenue. If it's not your core strength and it's not generating leads or sales, consider outsourcing it.

5. Make your systems elastic. Can you scale up without hiring? Can you scale down without layoffs? In my experience, that's where real strength lies.

Bold moves still need clear eyes.

In *Days of Thunder*, there's a scene where the driver hits smoke on the track. Visibility drops to zero. Wrecks are happening all around him. And the advice he gets?

"You can drive through it."

Sometimes, that's what it takes. You power through the chaos. But you still need to know what you're driving and where you're going.

Making a major tech investment in a moment of panic isn't a strategy. It's gambling. If you're going to move fast, do it with clarity. Use tools that are built to last. Train people to execute with confidence. Focus on what's actually growing your business, not what's trending in your feed.

That's how you keep winning, no matter what the market throws at you.

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