Based on the provided transcript, here are the actionable action items:

1. **Action Item**: Initiate the onboarding process for potential pilot program participants at 91.
- **Responsibility**: Rowly Hirst (rhirst@trustrelate.com)
- **Deadline**: ASAP to capitalize on current momentum and interest.

2. **Action Item**: Integrate Relate's API with HubSpot to automate the transfer of meeting summaries into the CRM.
- **Responsibility**: Rowly Hirst (rhirst@trustrelate.com) and the technical team
- **Deadline**: Set a target date for completion within the next 30 days.

3. **Action Item**: Explore opportunities to present Relate's capabilities to Mercer, leveraging existing connections.
- **Responsibility**: Rowly Hirst (rhirst@trustrelate.com) and any other team members with relevant contacts
- **Deadline**: Schedule initial discussions within the next two weeks.

4. **Action Item**: Discuss investment opportunities with interested parties, including the planner and Andrew Killian from Akura Capital.
- **Responsibility**: Rowly Hirst (rhirst@trustrelate.com)
- **Deadline**: Engage in conversations and gauge interest within the next month.

5. **Action Item**: Develop and provide training materials and guides for new users on how to effectively use Relate for training and implementing insights from Sandy.
- **Responsibility**: Rowly Hirst (rhirst@trustrelate.com) and the Trusted Advisor Associates team
- **Deadline**: Create and distribute materials within the next 60 days.

Please note that the deadlines are suggested based on the urgency implied in the transcript and may need to be adjusted based on the actual capabilities and resources of the team.